Plan BayArea 2040

# Plan Bay Area
# Projections 2040

## A Companion to Plan Bay Area 2040

NOVEMBER 2018

Association of Bay Area Governments

Metropolitan Transportation Commission

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OF BAY AREA
GOVERNMENTS

METROPOLITAN
TRANSPORTATION
COMMISSION

Bay Area Metro Center
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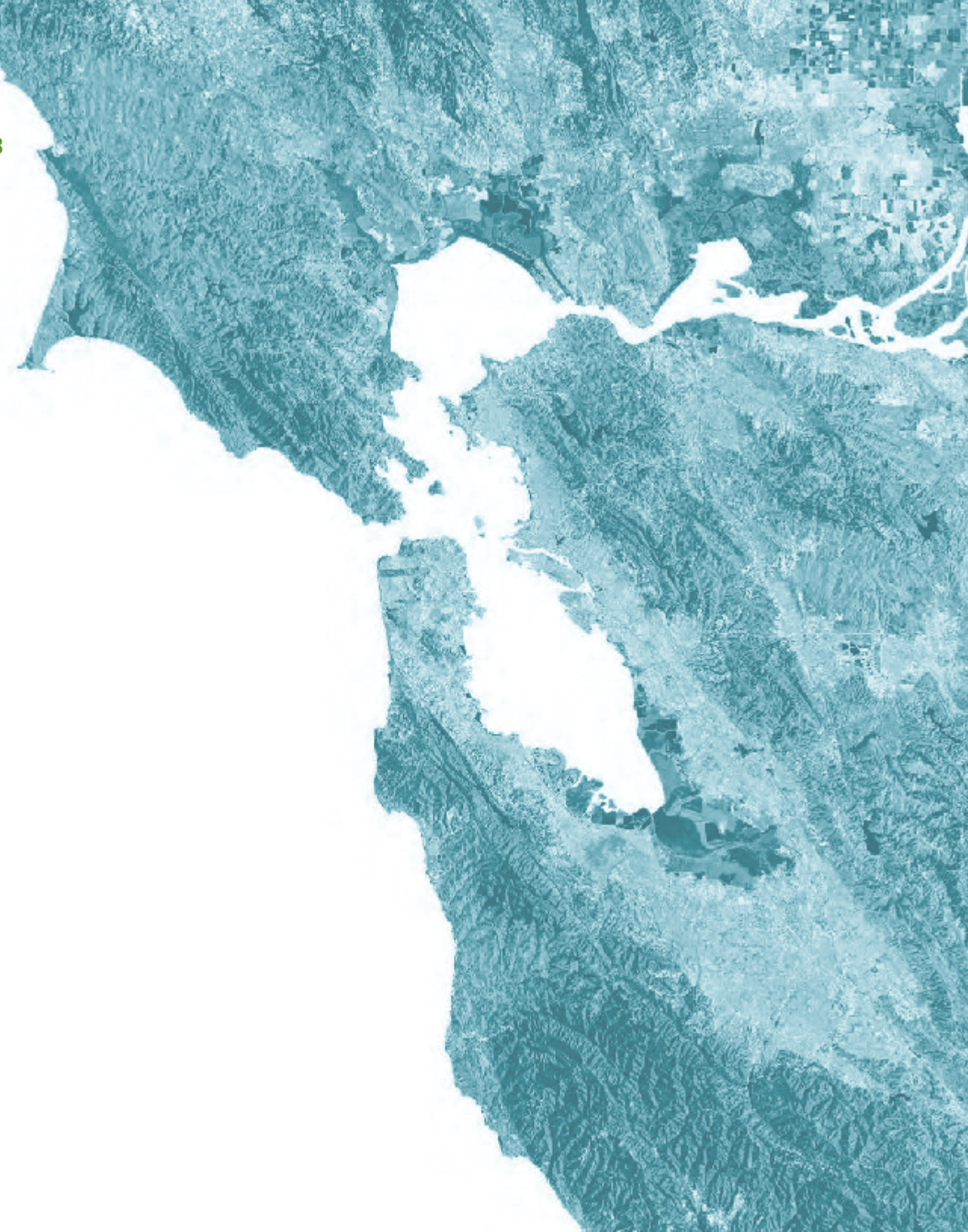


Napa County.
Credit: iStock

# Introduction

## PLAN BAY AREA 2040 PROJECTIONS — WHAT IS IT?

Plan Bay Area 2040 Projections is a data compendium that presents projected growth of the San Francisco Bay Area, its nine counties, 101 cities and smaller geographic areas. It is a statistical companion to Plan Bay Area 2040 (PBA 2040 or Plan), a plan adopted by the Association of Bay Area Governments (ABAG) and the Metropolitan Transportation Commission (MTC) in July 2017 to meet state law requirements for a coordinated land use and transportation planning process. The Plan provides a policy and performance based road-map for accommodating projected household and employment growth in the nine-county Bay Area through 2040 along with a transportation investment strategy for the region. The Plan further details how the Bay Area can make progress toward the region's long-range transportation and land use goals.

South San Francisco and Peninsula — aerial. Credit: iStock

The Plan is a limited and focused update of the first Plan Bay Area, adopted by ABAG and MTC in July 2013. However, the revised data in the Plan Projections differs in level and distribution of growth from Projections 2013, reflecting changing expectations for growth in the region over the past four years, new levels of investment in specific locations in the region, revised planning approaches in some of the region's cities and application of a new suite of models.

This report describes the level of employment, household, and population growth the region may incur between 2010 and 2040 based on assumptions about (1) the US economy and demographic change overall, (2) how different economic sectors will grow and change, and (3) the region's success in meeting the housing investment strategies as encouraged by the Plan.

The detail provided at the jurisdiction level in the compendium and at more detailed geographic levels in electronic form reflects the Plan's focused growth strategy and associated pattern of how the increased jobs, population and households would appear throughout the region. This document introduces the forecasts and projections underlying the Plan and gives a high-level interpretation of the results.

## THE REGIONAL POLICY CONTEXT OF PBA 2040 PROJECTIONS

ABAG has provided a series of projections documents for the region since the mid-1970s. The projections began as "business as usual" outlooks, assuming strong trend continuity in the distribution of new development. Over time, projections have taken greater account of explicit land use policy, first by incorporating information on local plans and associated assumptions about growth (an input-focus), but more recently by focusing more growth in existing communities, near high-quality transit (an output-focus). This principle of "smart growth" has received an added state-level prominence as regions are now statutorily required to explicitly consider sustainability in land use and transportation planning. Notably, many jurisdictions in the region were already local leaders in balancing land use and transportation development needs with a view to sustainability.

## USING THE PROJECTIONS

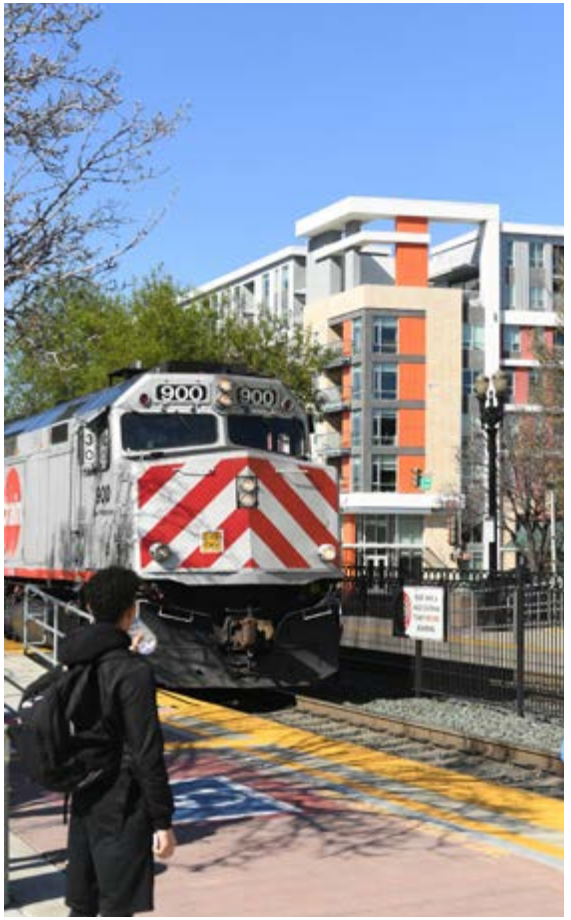
How to use and interpret the projections depends on the purpose. The information in this document and related files can be seen as a starting point for understanding how the region may grow and how the region's jurisdictions might fare in comparative terms given the regionally projected growth and local market forces as mediated through local and regional land use policy. The intention is to understand—and compile into one place for easy reference—the collective interactions of local land policy, business and household location patterns, developer investments and regional economic trends. This future snapshot of the region, in turn, helps in understanding potential future demand for housing and transportation services, all the while offering estimates of future greenhouse gas production.

Depending on the purpose, the projections may be useful:

- As an illustration of one locality's possible future in geographic context of neighbors and region
- In comparing policy-based projections with current general plan jurisdiction goals
- As an input in the local planning / project review process.

The intention is to offer a regional vision as a context for local planning, and to illustrate how residential and job-oriented development in different parts of the region are connected. The information in this series can help to inform local planning in the context of larger regional goals and objectives, but does not impose a specific outcome on a local jurisdiction: neither Plan Bay Area, nor these companion projections, are a substitute for the local planning process. The Plan projection is not prescriptive: it does not mandate changes to local zoning rules, general plans or processes for reviewing development projects; nor is the Plan an enforceable direct or indirect cap on development locations or targets in the region. Instead, the Plan, and by extension the projections as presented in this document, reflect a more collaborative approach and regional dialogue on the interrelated nature of job growth, housing markets and open space preservation.

The next section describes the underlying approach to reaching these numbers in some detail. Users interested primarily in the outcome — the data sets — can move ahead to the data summaries that follow.




Housing located near Redwood City Caltrain Station
Credit: Noah Berger

# Data Methodology

The data for the projections were prepared in connection with the Plan, adopted by ABAG and MTC in the summer of 2017. The Plan is a performance-based planning document produced by the regional agencies in consultation with a range of external stakeholders. California Senate Bill 375, passed in 2008, requires regional agencies to integrate the land use and transportation planning processes that were historically independent efforts. Prior regional transportation plans, produced every four years, had incorporated performance measures for over a decade. However, Senate Bill 375 required that regional planning efforts henceforth incorporate both a land use pattern and transportation investment package which achieve per-capita greenhouse gas reduction performance targets set by the California Air Resources Board. These requirements influence the planning process by having an explicit focus on outcomes (not of the land use distribution as such), in terms of transportation investments as well as land use and transportation policies. Performance measures incorporated in the Plan capture progress on a range of topics related to land use and transportation, such as risk of displacement, open space protection, transportation system effectiveness, and health impacts associated with air quality, road safety, and physical inactivity, among others. This outcome-focused approach differs from the forecasting conducted in earlier decades, where projections were more of a compendium of local policy expectations, but largely agnostic with respect to the larger land use patterns and its performance from a local and regional standpoint – projections were decidedly "business-as-usual."

## SCENARIO PLANNING AND PROJECTIONS

The current generation of Bay Area projections, charged with reducing greenhouse gases per state law, represents land use policies more explicitly, seeking to focus more growth in Priority Development Areas (PDAs). Development here is often "infill" in high-accessibility districts with shorter travel distances and a higher share of trips by non-auto modes. The Plan, in order to analyze alternative policy choices, was framed around distinctive growth scenarios, each representing a contrasting land use future characterized by variation in PDA zoned capacities, inclusionary housing provisions, parking requirements and a number of other assumptions. The Preferred Scenario in the Plan (the basis for the numbers in this document) applies a combination of state, regional and local policy assumptions that align with an increasing commitment to directing larger shares of growth within the existing urban footprint. In this scenario, three out of four new households would be in PDAs, whereas in the baseline No Project scenario reflecting current general plans, the share of households headed to PDAs would be just one in three. From a bird's eye view, the bigger cities would garner a larger share of households, with less growth in greenfield development on the outer edges of the region than might occur absent the illustrative policies featured in the regional plan.

## MODELING SYSTEM

The data in PBA 2040 Projections has been developed using a suite of models, operated according to technical direction from an advisory committee, as well as direction from ABAG's and MTC's policy making boards. The models include, chiefly, a regional economic model with related modules estimating the future total population, households and jobs for the region, as well as a land use model which in turn distributes those totals to smaller geographic areas.

**Regional Economic Model (Bay Area REMI):** The REMI model estimates overall economic activity by sector and population levels. It is based on econometric relationships between components of the economy: producer and consumer prices, labor and factor productivity, industry trading linkages, and how changes in one component affects others: job growth (or demand for more work), for example, either requires the existing population to work more, which could lead to a higher number of employed adults, greater in-commuting from outside the region, or, alternatively, more domestic or international migration.

In reality, all three can happen at the same time. Workers receive wages and spend this money on goods and services, including housing. A shortage in housing leads to price increases which in turn means the region is less competitive and other

regions may pick up the slack to the extent jobs can be substituted to other regions. Conversely, strong productivity in the region for key industries make it attractive to employers.

Overall, the model accounts for a large number of interactions, and ultimately produces regional counts of jobs, population, and total personal income, and estimates a labor force participation rate. The Bay Area REMI Regional Control is ABAG/MTC's calibrated forecast for regional growth of population and of employment by place of work and by residence, after making adjustments to the standard REMI model national and regional forecasts to better reflect Bay Area characteristics and conditions. A more in-depth description of the analysis underlying the Bay Area REMI Regional Control as well as the Household and Income estimations is available in the supplemental report, Regional Forecast of Jobs, Population and Housing.[1]

**Regional Household Estimates:** The estimate of the number of households implied by the REMI forecast takes into account the share of adults in each age category produced by the model who are heads of households (the headship rate). Headship rates are calculated from detailed American Community Survey Public Micro-Use Sample data (PUMS) for different demographic subgroups for combinations of age/race/gender: two genders, four race / ethnic groups and 15 age groups, or a total of 120 distinct groups. The rates are then applied to the REMI population as described by age and ethnicity. The household formation rate is based on regional-level assumptions about demographic shifts in age, ethnic profile and other factors, combined with assumptions that household size tendencies will remain stable or shift slowly for an age and ethnic category.

At the city level, however, projected changes in household population and average household size are based on the overall regional trends and the assumption that new housing will largely retain location-specific household size patterns. For example, jurisdictions with lower average household sizes (i.e., Emeryville, San Francisco, Mountain View and Sausalito) tend to have a higher share of housing units with zero or one bedroom. In reality, the average household size within a community reflects a variety of demographic characteristics such as income mix, age profile, and proportion of recent immigrants, as well as housing stock characteristics (prevailing size of units) and personal preferences. These factors and the influence on household size may change over the 30 year projection period in ways that the models don't capture.

The models mentioned so far operate at high levels of aggregation. A separate model deals with the micro-foundations of land use and housing markets and allocate the larger totals to small geographic areas: UrbanSim.

**UrbanSim:** UrbanSim is a land use model that allocates the regionally determined counts of households and jobs to the small area level, answering the question of where jobs and households locate or move within the region, given basic information on the future types of households and jobs. To do so, a database of synthetic households and jobs has been created, and each assigned to one of the region's some two million parcels, such that they add up to Census Bureau totals for a given geography. UrbanSim characterizes the region's buildings with respect to size, age, access to transit, freeways, jobs and amenities and cost. It also estimates the probability of a mover (a job in a business establishment, or household) picking a particular type of location: The model can "see" for example, that manufacturing jobs are far less likely to be located in a downtown area with good transit access on expensive land. Such jobs are more likely to be found on larger lots in warehouse-type buildings, with good access to freeways.

Separately, the model is trained on the whereabouts of households, estimating the probability of a low-income household moving into expensive neighborhoods. This explicit representation of "agents" such as households and jobs allows for what-if simulations of responses to a change in land use policy, the cost of transportation, or new infrastructure in a relatively structured fashion, taking into account basic economic signals.

As new "agents" are added as the economy and population grow during the forecast period, the model uses these observed probabilities to place them in future urban space. The model keeps

track of vacancy rates as new households and jobs are added, and expands the building stock according to demand within the parameters of local zoning provisions. Areas designated by local jurisdictions as PDAs may have zoning adjustments, sometimes graduated over time until 2040, to allow the drawing of housing development and or jobs to those sites. The model system is behaviorally and geographically explicit, leading to a more transparent simulation.

Taken together with the regional model, the land use model can fully account for the economy's growth to 2040, along with an internally consistent geographic allocation of that growth, given zoning and other policy constraints and assumptions. The Land Use Modeling Report supplement to the Plan provides technical background on this process.[2]

## ADDITIONAL POST-PROCESSING

The county, jurisdiction and PDA data for this report comes mainly from the UrbanSim model, but post-processing was performed to make the data available at the jurisdiction and sub-regional study area levels. UrbanSim runs simulations at the parcel level, but the most comprehensive output is found at the scale of the Travel Analysis Zone (TAZ), where population data is available in six age groups. As more variables were defined in these TAZ-level data than in the jurisdiction-level model files, population data was obtained from the TAZ files, while jobs and household counts were pulled directly from the jurisdiction-level files. As the TAZ data's population universe does not include institutional group quarter populations, group quarter counts were adjusted to represent both institutional and non-institutional populations. A series of imputations—translating data from one geographic unit of analysis to another, as well as adding categorical precision—underlie the data presented. Jurisdiction-level counts of jobs and households mirror the ones reported in the modeling report referenced in footnote 2.

### Geographic Imputation

The Bay Area is divided into 1,454 Travel Analysis Zones which were used as building blocks to get to other geographic summary levels. In most cases, getting to jurisdiction data required aggregating TAZs. Some smaller jurisdictions, however, only comprise part of a given TAZ. Parcel-based housing unit counts were used to determine the share of a TAZ to be counted in each jurisdiction in cases where the TAZ straddled jurisdictions, with the assumption that the distribution of housing units is proportional to development activity in general in a TAZ.

### Age Category Imputation

The TAZ data comes with population distributed in six age groups without a gender breakdown (ages 0-4, 5-19, 20-44, 45-64, 65+). Detailed population data from Census 2010 was used to unpack these coarser categories into five-year gender-specific age groups at the jurisdiction level, adjusted in future years in proportion to the changing age proportions from the regional forecast. Note that the TAZ file population counts differ from the regional forecast in that it includes an in-commuter adjustment of around 1 percent.[3] That difference was carried forward in the jurisdiction-level counts used in this report. The TAZ age group counts for intermediate years differ from the regional forecast. In these cases, Projections 2040 follows the TAZ file. For years 2010 and 2040, the two are largely consistent, except for the commuter portion.

### Economic Sector Imputation

The model partitions economic activity into six main sectors:

- Agriculture and Natural Resources
- Manufacturing, Wholesale and Transportation
- Retail
- Financial and Professional Services
- Health, Educational and Recreational Services
- Information, Government and Construction

To provide more detail at the county summary level only (not jurisdiction level), an imputation was done using within-group proportions from a business establishment dataset with businesses classified both at the six-sector grouping as well as the target 11-sector grouping. To ensure jurisdictional level totals are respected, both county-level and six-sector totals are adhered to. A proportional fitting algorithm was applied, ensuring 11-sector county totals add up to regional 11-sector totals.[4] Jurisdiction-level job counts are available in six sectors, and only the county-level summary comes with the more detailed 11 sectors.

## ESTIMATED VS MODELED

While Plan Bay Area 2040 was adopted in 2017, the preparation of the detailed databases underpinning it had been ongoing for several years. When the model and associated data was developed, data on 2015 was not yet available, for which reason 2015 counts are from model simulations rather than "observed" counts. Beginning with 2015 and proceeding in five-year increments through 2040, model data was tabulated from the synthetic building-specific microdata on households and jobs by different geographic units - metropolitan statistical areas, counties, jurisdictions and travel analysis zones (TAZs). The 2010 base year data for the projection was tabulated from the model database. While these data are designed to track Census 2010 counts in the aggregate, small aggregate differences may appear.[5]

The tables in this document compare the now "historic" model years of 2010 and 2015 to counts prepared using federal and state data sources. Given that these data are from different sources with different geographic resolution and often different conceptual definitions relative to the regional forecast, there are **some differences in geography, sector and even totals** compared with modeled estimates.

The employment estimates are subject to considerable differences. **It is important to note that in accounting for jobs, data sources differ widely with respect to what counts as a job, where it is considered located, and under which industry sector it is counted.** In administrative data, a firm with several establishments may inadvertently report employment at the main administrative office of the firm, which may be in a different location from where the work is performed. Further differences may appear due to Census Bureau confidentiality protection measures such as swaps.[6] The land use model uses data from a private vendor to represent address-level employment unavailable from public sources, leading to further differences between model and public data estimates in terms of both location and industry coding. Still, it is hoped that including these estimates from other sources will provide more context and on occasion a different benchmark against which to assess growth trajectories per Projections 2040. Below follows a more variable-specific discussion of public sources used for 2010 and 2015 estimates.

TABLE 1: Data Sources for Public Estimates

| | 2010 | 2015 |
|---|---|---|
| Population | DOF E-5 | DOF E-5 |
| Households | DOF E-5 | DOF E-5 |
| Industry Employment by Workplace Geography | LEHD Origin-Destination Employment Statistics (LODES) dataset, Workplace Area Characteristics (WAC) File (wage and salary); ACS 2008-2012 5YR B08528 place of work (self-employment, with industry distribution inferred from ACS PUMS county place of work tabulation) | LEHD Origin-Destination Employment Statistics (LODES) dataset, Workplace Area Characteristics (WAC) File (wage and salary); ACS 2013-2017 5YR B08528 place of work (self-employment, with industry distribution inferred from ACS PUMS county place of work tabulation) |
| Employed Residents | ACS 2008-2012 5YR B23025 place of residence jurisdiction | ACS 2013-2017 5YR B23025 place of residence jurisdiction |
| Population by Age | Census 2010 SF1 P12 | Census 2010 SF1; adjusted to fit counts from DOF E-5 city-level population data and county-level age distributions from ACS PUMS data |

- **Population and household** counts come from California Department of Finance E-5 reports. Age distribution is from Census 2010 Summary File 1.
- **Employed residents** counts come from American Community Survey data. For year

2010 data, the five-year sample 2008-2012 was used (with 2010 being the midpoint in the five-year interval), and for 2015, the five-year sample 2013-2017 was used, with 2015 being the midpoint in that five-year interval. Note that these *city-level* data differ from the model baseline employment constructed from Bureau of Labor Statistics *county-level* data.

- **Industry employment** at the city-level is summarized from US Census Bureau Longitudinal Employment and Housing Dynamics Origin-Destination Employment Statistics (LODES) Workplace Area Characteristic data for the wage and salary universe. Differences in how NAICS industries are aggregated in the LODES data and in Plan Bay Area model data mean that the two were counting jobs in different categories, with the key difference being in whether to count public education jobs as government jobs, or education. To make numbers more comparable to the regional forecast, we applied the industry distribution obtained from California Employment Development Department's Quarterly Census of Employment and Wages (QCEW) data, where ownership information was available. Due to data limitations in geography and coverage, agricultural employment counts are partial.

- **Self-employed or sole proprietor workers** are not included in the wage and salary universe. Therefore, to get a more complete job count we supplement with data from the American Community Survey. For self-employed workers, 2015 counts are estimated using the same approach as for employed residents, using five-year ACS releases, taking the data to represent the midpoint year. As we do not have the industry breakdown of self-employed workers by the workplace city, we instead tabulated county-level place-of-work industry distribution data from ACS PUMS for this segment and applied it to each cities county.

## KEY SOURCES OF UNCERTAINTY

The projections are based on a large number of data sources and modeling steps, each of which in turn embodies assumptions about the economy, land markets, housing preferences and business behavior over a 30-year period. Great effort has been taken to assemble and keep databases reasonably accurate and up to date, accounting for zoning policies, development projects completed or in the works ("pipeline" data), as well as a parcel-level inventory of buildings and their "synthetic" occupants. Nonetheless, inaccuracies pertain to each part:

- The regional model represents economic relationships between sectors while accounting for the size and cost of the labor force, and allowing for migration to/from the region. Such relationships could change.

- The land use model, UrbanSim, works by assigning probability to location choices and placing new households and jobs accordingly in the real estate market. Any of these components or their relationships are subject to model specification and data errors.

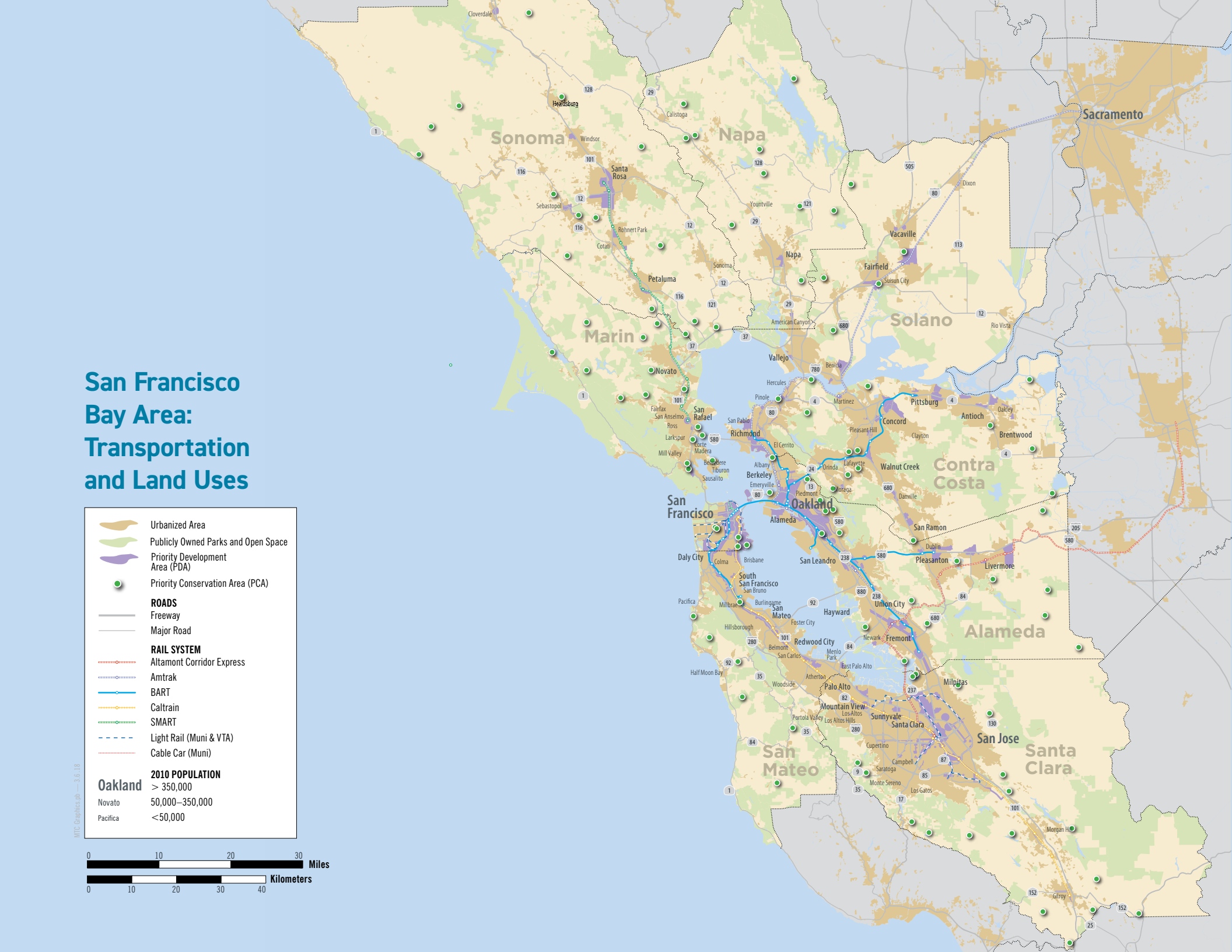
- A noteworthy source of error pertains to policy assumptions embedded in the land use framework. There are two main expressions of these: First, complex local zoning assumptions for each of the more than 100 jurisdictions had to be translated from planning code to computer code. This translation may have been too accommodating or, in turn, too restrictive in a given place, leading to incorrect accounting of development capacity, with too little or too much development being a possible outcome in the modeling system. Second, inherent in making forward-looking policy assumptions for a 30-year period is the likelihood that those assumptions themselves will change, just as policies change over time as new conditions arise and the status quo reassessed. To fix them by assumption for 30 years will almost necessarily be a source of error, particularly where policy debates are active and new land use regulations introduced with some frequency. This type of error is more intractable as it pertains to inherent uncertainty about the future, but should nonetheless be recognized.

Together, the above should stress the importance of interpreting any model data as a necessarily partial view of reality. The projections offer an answer to the question of what the future might look like: Given assumptions and data available, they provide stylized facts about possible futures, thereby enabling conversations based on a shared set of numbers.

# San Francisco Bay Area Regional Overview

Santa Clara County.
Credit: Karl Nielsen

# San Francisco Bay Area: Transportation and Land Uses




MTC Graphics.pb — 3.6.18

# San Francisco Bay Area Regional Overview

The San Francisco Bay Area has much scenic beauty, a strong economy, a range of transportation options and diversity in terms of population, geography, and urban form. The region, with some 7,000 square miles and 7.7 million people per 2018, has a population larger than 38 states. Its economy measured as GDP at $837 billion[7] is larger than all but the largest states (New York, Texas, Illinois, and of course California). The sheer size of the region and its economy suggests a diversity of places and economies within the larger region. As such, there is the finance sector and increasingly tech social media sector in San Francisco, biotech in San Mateo, computers and software in Silicon Valley, shipping and government services in Alameda and the expansive wine and hospitality industries in the North Bay counties. The region can be thought of as a collection of places which are more or less tightly connected by labor market and shopping ties, even as relatively few trips traverse the larger region. More commonly, work trips cover smaller parts of the region, defining distinctive sub-regions within a larger whole. In this report, we refer to four subregions: The North Bay includes Marin, Napa, Solano, and Sonoma counties; the East Bay covers Alameda and Contra Costa counties; South Bay refers to Santa Clara County; and West Bay includes San Francisco and San Mateo counties.

TABLE 2: Gross Domestic Product (Billions of Fixed (2009) Dollars)

| Year | Bay Area | U.S. | Bay Area Share of US GDP |
|---|---|---|---|
| 1990 | $ 279.7 | $ 9,391.3 | 3.0% |
| 1995 | $ 327.0 | $ 10,559.2 | 3.1% |
| 2000 | $ 462.8 | $ 12,770.0 | 3.6% |
| 2005 | $ 472.0 | $ 14,282.2 | 3.3% |
| 2010 | $ 496.6 | $ 14,791.9 | 3.4% |
| 2015 | $ 653.4 | $ 16,689.2 | 3.9% |
| 2020 | $ 729.1 | $ 19,015.2 | 3.8% |
| 2025 | $ 840.6 | $ 21,327.0 | 3.9% |
| 2030 | $ 965.2 | $ 23,795.9 | 4.1% |
| 2035 | $ 1,089.0 | $ 26,045.1 | 4.2% |
| 2040 | $ 1,227.0 | $ 28,508.2 | 4.3% |

Source: Projections from ABAG Bay Area REMI model, historic from REMI historic data, based on US Bureau of Economic Analysis data.

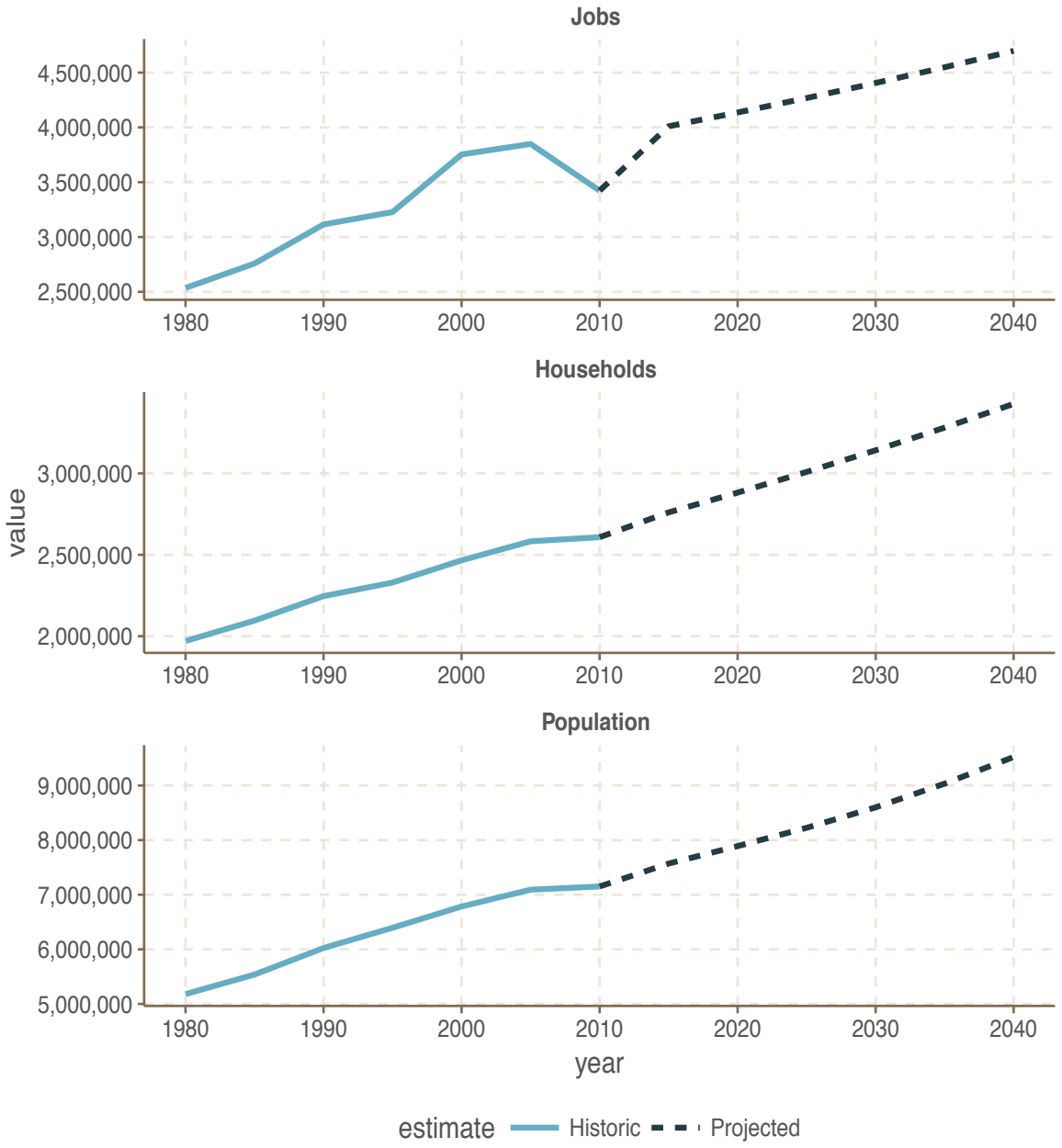
The Bay Area's diversity is reflected in the differences among its nine counties and 101 cities of vastly different sizes and lifestyles. Only San José's population has surpassed a million. San Francisco is approaching 900,000 residents, while Oakland has around 420,000 residents. Fremont comes next with 230,000 residents, and Santa Rosa, the fifth largest city, has 175,000 residents. About 16 additional cities have more than 100,000 people. Yet there are many shared characteristics among places within counties or larger geographic areas. In addition to its strong economy, the region's many attractions and breathtaking open spaces have long made the Bay Area a magnet for new ideas and people. The Bay Area has a reputation as one of the cradles of global innovation. This has brought prosperity to many in the region, but also a history of volatility in employment levels as well as increasing inequities between those who benefit from economic growth and those who do not but still bear the region's higher costs. When the economy

is strong, it may bring a surge of new migration from throughout the US and the world into the region. When innovative industries enter more mature phases, growth may level off or decline, and population inflows may change to outflows. New technology increases productivity and alters production process, on occation seeding entirely new industries and markets. This creates challenges for forecasting employment and even population trends. These cycles of innovation and growth have brought about changes in the composition of employment and population and are inherent features of the local economy.

## REGIONAL OUTPUT

The Bay Area's share of US GDP has grown from three percent in 1990 to almost four percent in 2015. The rate of growth has ranged from an inflation-adjusted loss of 1.5 percent between 2000 and 2001 to growth of 5.7 percent between 2014 and 2015. During the current economic expansion, output has expanded by a third while jobs are up 14 percent, reflecting an increase in overall productivity. The information sector played a key role in this growth, with output expanding at an annualized real rate of 10 percent in the San Francisco Metropolitan Area (which includes the East Bay, West Bay and Marin County) and over nine percent in the South Bay. Since 2002, If the region retains its current competitive advantage in the information sector, regional GDP is predicted to grow at a real rate of 2.6 percent per year, raising the region's share of the US economy from 3.4 percent in 2010 to 4.3 percent by 2040.

### Population, Households and Jobs, Historic and Projected



## EMPLOYMENT

The Bay Area economy covers an array of activities, from standard-setting products and services exported to the rest of the country and beyond, to health care and other local services. The economy is dynamic, and new industries are often formed, and occasionally falter as the economic landscape and technologies evolve. As of 2010, the Bay Area provided 3.4 million jobs.

Employment in the Bay Area is projected to grow by 37 percent from 2010 to 2040, adding nearly 1.3 million jobs. In historic context, almost half of the job gain returns to the regional employment that was lost in the Great Recession and the 2001 downturn. By 2015, region-wide employment levels had surpassed both the smaller peak reached at the top of the 2001-2006 housing boom, as well as the more exuberant peak that preceded it just prior to the dot-com bust in 2000. Still, the recovery was uneven — about a third of jurisdictions remained at employment levels below the 2000 peak 15 years later. While, as of the time of writing in 2018, the recovery enters its ninth year, the projection generally is not intended to capture the boom and bust cycle and should be taken as a future average across cyclical effects. Accordingly, the rate of projected employment growth slows after 2015.

The geographic pattern of projected job growth is different than the previous trend that began in the mid-1980s, when employment expanded most extensively in suburban areas and back-office functions moved out of San Francisco in considerable numbers. Under Plan Bay Area 2040, about half of new jobs are anticipated to concentrate within designated PDAs, many of which are existing employment centers. Because of the large size of the overall employment base and the Plan's development strategy, the distribution of jobs among counties is projected to change very little.

At the county level, San Francisco, Santa Clara, San Mateo, Contra Costa and Alameda counties are projected to experience the fastest job growth rates (between 35 and 51 percent). In absolute terms Santa Clara, San Francisco, Alameda and Contra Costa counties will collectively absorb more than eight out of 10 of the region's projected new jobs, reflecting some concentration of jobs in established centers over time. Although the incremental shifts in employment are small after 2015 (possibly even smaller when actual estimates are used instead of the 2015 modeled baseline), the magnitude of growth is significant for many places. San Francisco, San José and Oakland cement their roles as leading job centers of the region, and additional small to mid-sized employment concentrations expand in places such as Santa Clara and Redwood City in the South and West Bay, American Canyon in the North Bay, and Concord, San Ramon, Dublin and many other East Bay locations.

As to sectors, although the number of jobs added are not dissimilar between the recent recovery and the projected future growth, some economic restructuring should be expected looking forward. Productivity-enhancing technological advances may dampen job growth in some of the very sectors spawned by these advances, leaving very little job growth overall in the information sector, despite the expected continuation of the strong role of Internet related activities. While there are hopes and some signs of a manufacturing renaissance, the Bay Area is a high cost labor and real estate market constraining which parts of the value chain can feasibly grow here. While this is true for all industries generally, the **Manufacturing and Wholesale** sector tends to need more land, limiting the long term outlook for manufacturing in the area beyond prototyping. Accordingly, the forecast overall shows a near-flat projection for manufacturing in the region. While a small loss of manufacturing and wholesale jobs is projected for the region as a whole, a few counties buck the trend, going positive: Contra Costa and Alameda see modest growth at less than seven percent, while Solano County is expected to see a moderate 22 percent increase.

**The Professional and Managerial Services** sector has the highest share of jobs in the region (18 percent). Although professional services is represented in all counties, the sector is concentrated in the South Bay and San Francisco/Peninsula subregions, which have a combined 75 percent of the region's jobs in this sector. The sector also accounts for the lion's share of job growth going forward: two thirds of employment growth is projected in professional and business services (including such sectors as computer system design) and **Health and Educational**

**Services**. These sectors currently include not only high wage, high skilled occupations, but also a number of lower skilled personal service jobs.

As the historic heart of the Bay Area, the City and County of San Francisco serves as a financial center and tourist destination, providing 29 percent of regional employment in the **Financial and Leasing** sector and 22 percent of the **Arts, Recreation, and Other Services** sector.

The technology-focused Silicon Valley concentrated in the South Bay has long been a significant driver of regional economic growth, particularly in the **Information Services, Professional & Managerial Services**, and **Manufacturing and Wholesale** sectors. In 2015, about 67 percent of the region's jobs in Manufacturing & Wholesale jobs are located in Santa Clara and Alameda counties, while Santa Clara and San Mateo counties represent 55 percent of regional Information jobs. In addition to Silicon Valley, several clusters of Manufacturing and Technology industries exist in other parts of the East Bay and some of the North Bay counties.

The North Bay counties have strong agricultural sectors grounded in the wine industry, although the East Bay, South Bay, and Peninsula also have important farmland. Combined, the North Bay counties represent 63 percent of employment in the **Agricultural and Natural Resources** sector, which in spite of its small overall numbers (about one percent) nonetheless represents an economically and culturally significant industry to the region, while offering scenic landscapes as well, itself a feature of local tourism.

The **Health and Educational Services** sector, which currently comprises 13 percent of the Bay Area's employment, is anchored by renowned universities and hospitals. The **Retail** sector also contributes to the regional economy, serving local needs as well as providing regional shopping destinations. As primarily local-serving sectors, the distribution of jobs in these two categories is roughly proportional to each county's share of the regional population.

As the population grows, so will demand for local services. For example, the **Health and Educational Services** sector and **Arts, Recreation & Other Services** sectors are expected to add nearly 440,000 jobs, representing 40 percent of new employment in the region. In addition, the number of jobs in the Construction sector is expected to increase by 58 percent over 2010 levels, bouncing back from the Great Recession lows. Conversely, Manufacturing and Wholesale, Retail, and Government are projected to account for a smaller share of jobs by 2040.

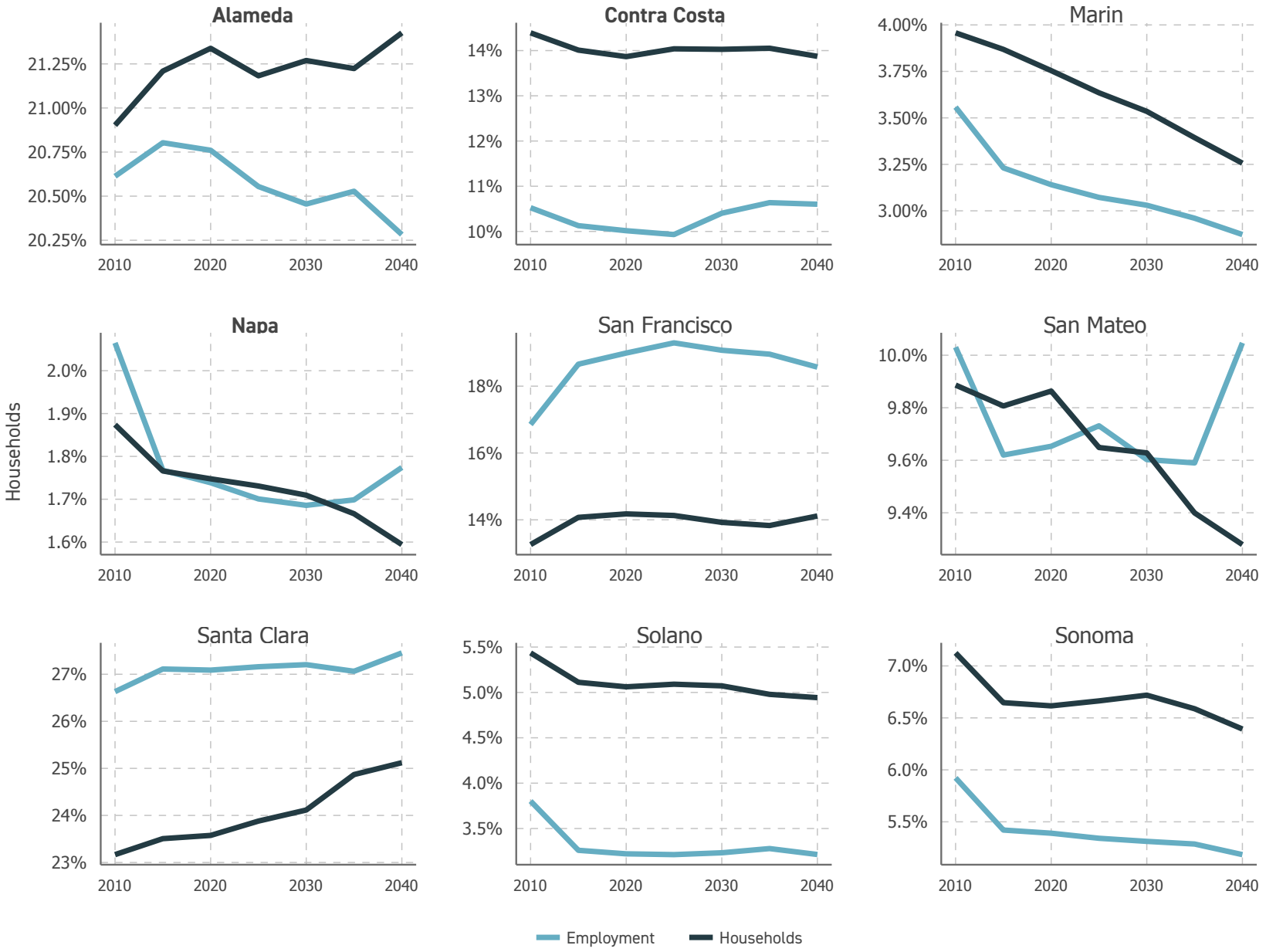
The most concentrated employment centers are in Santa Clara and San Francisco counties, both counties with substantial technology clusters supporting a host of related industries and services. Both locations have higher shares of jobs than population. In contrast, Contra Costa, Solano and Sonoma counties each have higher proportions of population than of jobs. The remaining four counties have fairly balanced proportions of jobs and population. The projected shares of household and job growth are more balanced than existing shares, although there are still counties where job growth is projected to out-pace household growth (San Francisco) or the reverse (Contra Costa).

## POPULATION

As of 2010, the total population of the Bay Area was just over 7,150,000, with roughly 2.6 million households. By 2015, the population had increased by some 425,000, to 7,574,000, an annual growth rate of 1.2 percent. Since the 1970s, the annual growth rate has hovered around one percent, with some periods a bit higher and some a bit lower. The 1980s saw a growth rate that was a bit higher, while the 2000s saw lower growth as the region was impacted first by a housing boom and then the Great Recession. The pace has picked up again since, resuming pre-recession growth rates, and the forecast stabilizes this rate at about one percent through 2040.

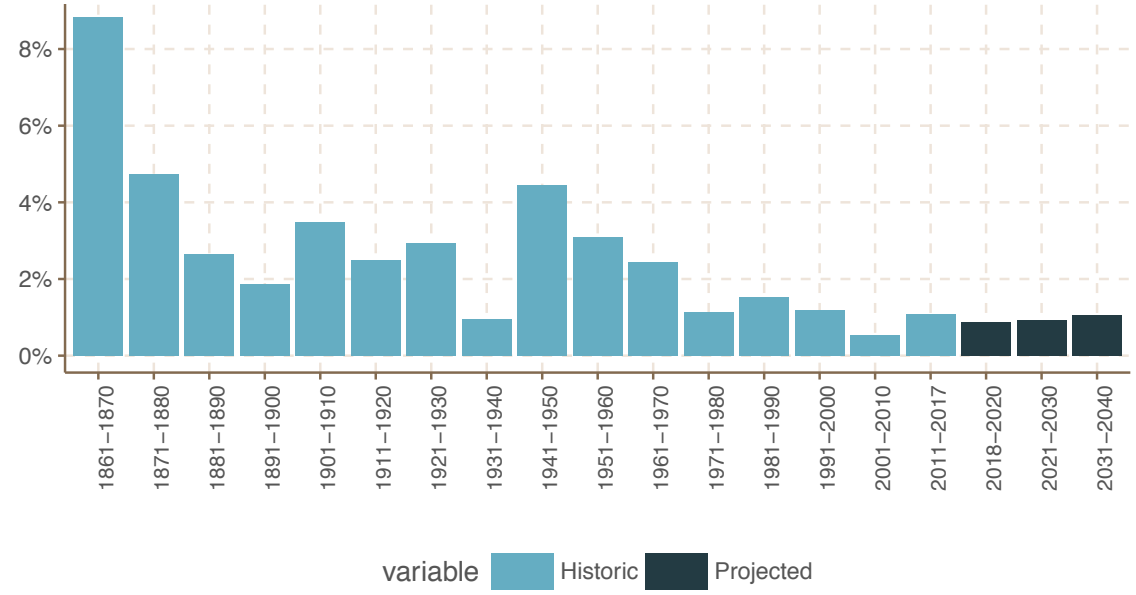
The population continues to be concentrated in the counties that also hold the bulk of the employment. Santa Clara, Alameda, Contra Costa, San Mateo and San Francisco counties collectively represented 82 percent of the regional population, leaving less than one in five residents in the North Bay counties through 2040. Individually, San Francisco and Santa Clara counties are projected to have the highest population growth rates (45 and 42 percent, respectively). These counties are home to the Bay Area's largest cities, where much of the new housing could be located in infill opportunities in already urbanized areas. Alameda, Contra Costa and San Mateo counties are projected to grow close to the regional

## Bay Area Households, Jobs by County
Share of Regional Total



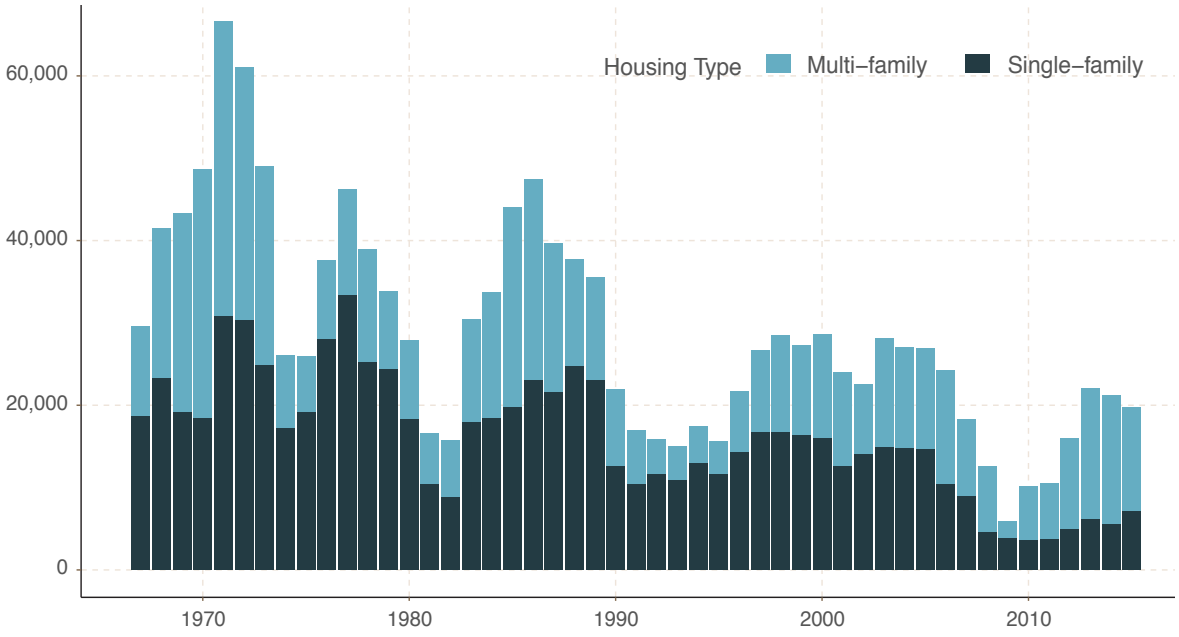

Source: *Plan Bay Area 2040*

### Annualized Population Growth Rates, Historic and Projected




Source: Calculated from California Department of Finance E5 reports (historic); PBA 2040 data (projected)

### Single- and Multi-Family Housing Completed, 1990–2015




Source: CIRB, various releases

average, while Sonoma (20 percent), Napa (18 percent), Solano (26 percent) and Marin (11 percent) each are expected to see smaller than average growth rates. Because Plan Bay Area relies on PDA and infill strategies to absorb most of the new growth, more than seven out of 10 households are projected to fall in PDAs.

By 2040, the population of the Bay Area is projected to reach almost 9.65 million residents (when in-commuting households are added, population is estimated to be 9.52 million), growing 35 percent over 2010 levels, and 26 percent over 2015 levels. Projections show the number of households growing at a slightly smaller rate of 31 percent, reaching 3.42 million by 2040. The difference in population and household growth rates translates into a marginal increase in the average household size from 2.67 to 2.76 persons per household. By 2040, Santa Clara and Solano counties are expected to have the highest average household size (2.90 and 2.92, respectively), while San Francisco will have the lowest (2.35). Marin's small household size by 2040 is second to only San Francisco's, but for different demographic reasons: older households tend to be smaller.

Underpinning the population growth is the growth in households and, ultimately the housing stock that supports this growth. Annual growth in households over the next three decades is expected to be somewhat smaller than during the 1980s boom, where the region averaged about 33,000 units per year. Yet, growth is expected to be considerably higher than what has transpired

the past few decades, and in particular in the first decade of the 21st century, which, in spite of a boom during the first half averaged to only about 20,000 units per year. As PDAs are increasingly cleared for construction as the program matures, production is projected to expand to a level of at least 25,000 units per year.

The population is further expected to become more diverse in terms of its racial and ethnic composition, owing to the high share of immigrants to the region. Regionally, the White, non-Latino portion of the population has dropped from 56 percent of the Bay Area population in 1990 to an estimated 41 percent in 2015, and is projected to account for only 31 percent of the population by 2040. The Black population is also dropping in share, while the shares of the Latino population and of Asian plus other (which includes those reporting mixed ethnicities) grow to 31 and 33 percent by 2040.

The change in population over the past 25 years has been less dramatic than the change in employment levels. Still, the population as a whole aged between 1990 and 2015, with the share of the population under 18 years of age dropping from 23.6 percent to 21.3 percent and the share 65 and over growing from 11.0 percent to 14.3 percent. This trend is forecast to continue, but with a more marked aging trend in the 25 years to come, where the number of seniors 65 and older will exceed the number of children by around 2020. By 2040, 18.8 percent of the population is projected to be below 18, while 22.2 percent will be above 65, of which more than half

TABLE 3: Projected Population Shares by Race/Ethnicity through 2040

| Year | Black Non-Latino | Latino | Asian and Other, Non-Latino | White, Non-Latino |
|---|---|---|---|---|
| 2010 | 6% | 24% | 27% | 42% |
| 2015 | 6% | 24% | 29% | 41% |
| 2020 | 6% | 26% | 30% | 39% |
| 2025 | 6% | 27% | 31% | 37% |
| 2030 | 6% | 28% | 31% | 35% |
| 2035 | 5% | 30% | 32% | 33% |
| 2040 | 5% | 31% | 33% | 31% |

Source: Projections from ABAG Bay Area REMI model, historic from REMI historic data, based on US Bureau of Economic Analysis data.
Note: REMI includes Asian individuals in the Other, Non-Latino category.

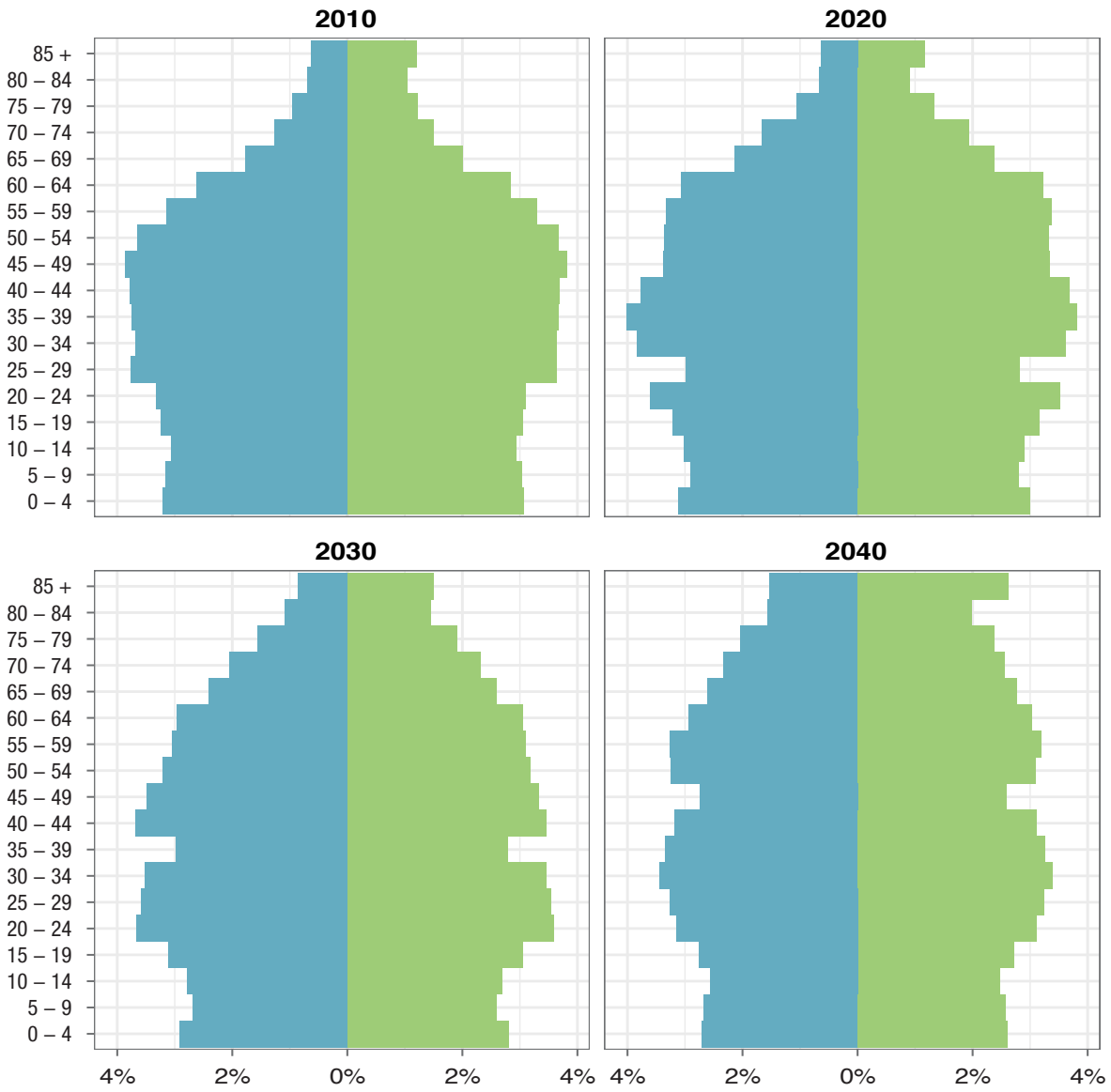
Junior High School students in Fremont.
Credit: MTC Archives

will be 75 and over.

In 1990, the median age in the region was 32.6 years, and by 2010 it had increased by nearly five years, to 37.2, reflecting declining fertility rates, inmigration of working-age adults as well as favorable life expectancies in the region. The median age is expected to peak by 2030, at 41.9 years before dropping slightly, to 41.5 years by 2040. The population pyramids capture this evolution. In 1990, there were solid shares of young adults, (aged 25-39, part of the baby boom cohort) as well as young children. By 2015, this picture had changed to a much more even distribution, with the young adult spikes missing while baby boomers approached retirement.

As the median age goes up, so does the age dependency ratio, measured as the count of children 0-14 and seniors 65+ relative to the population aged 15-64. In the Bay Area case, however, as the child dependency ratio (the ratio of children aged 0-14 to adults aged 15-64) largely holds steady at around .25, the senior portion of the age dependency ratio doubles, from .175 to .36. This reflects increased longevity and by the same token a reduced share of adults in the workforce. These changes underline challenges associated with changing demand for public and private services with impacts felt at the neighborhood scale: In one end of the age spectrum, we will likely see school closures following enrollment declines, while on the other end we expect increased need for senior care and associated services, including transportation, around the region.

## Projected Age Distribution, Bay Area




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

## REGIONAL SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 7,150,740 | 7,573,915 | 7,174,920 | 7,591,490 | 7,920,230 | 8,284,200 | 8,689,440 | 9,142,745 | 9,652,950 |
| Household Population | 6,998,465 | 7,423,305 | 7,029,350 | 7,438,280 | 7,758,540 | 8,113,640 | 8,509,245 | 8,952,495 | 9,451,375 |
| Households | 2,606,290 | 2,678,810 | 2,608,025 | 2,760,480 | 2,881,965 | 3,009,055 | 3,142,015 | 3,281,130 | 3,426,700 |
| Persons per Household | 2.69 | 2.77 | 2.70 | 2.69 | 2.69 | 2.70 | 2.71 | 2.73 | 2.76 |
| Employed Residents | 3,506,680 | 3,894,850 | 3,376,380 | 4,026,995 | 4,147,000 | 4,270,595 | 4,397,865 | 4,528,925 | 4,663,900 |
| Agriculture & Natural Resources | 17,775 | 18,905 | 22,800 | 24,990 | 24,865 | 24,740 | 24,620 | 24,500 | 24,380 |
| Construction | 158,235 | 208,230 | 165,115 | 214,970 | 223,660 | 234,985 | 253,405 | 283,260 | 313,405 |
| Manufacturing & Wholesale | 461,715 | 493,060 | 428,550 | 423,600 | 421,295 | 420,630 | 417,655 | 413,115 | 408,280 |
| Retail | 351,945 | 385,995 | 325,645 | 356,555 | 364,515 | 372,655 | 380,975 | 389,480 | 398,175 |
| Transportation & Utilities | 92,200 | 105,775 | 97,135 | 100,875 | 102,025 | 101,545 | 103,370 | 106,770 | 110,460 |
| Information | 127,220 | 174,155 | 117,545 | 167,695 | 164,360 | 163,800 | 165,255 | 165,675 | 164,965 |
| Financial & Leasing | 199,940 | 207,910 | 194,285 | 246,565 | 253,580 | 248,760 | 243,165 | 238,500 | 234,545 |
| Professional & Managerial Services | 619,135 | 787,900 | 623,120 | 892,265 | 920,790 | 962,260 | 1,005,650 | 1,049,290 | 1,093,435 |
| Health & Educational Services | 494,930 | 631,500 | 512,405 | 590,035 | 647,675 | 702,615 | 758,840 | 821,080 | 887,590 |
| Arts, Recreation & Other Services | 566,460 | 610,745 | 485,720 | 522,895 | 530,455 | 544,530 | 561,365 | 576,465 | 591,820 |
| Government | 362,270 | 401,885 | 450,520 | 469,690 | 482,970 | 491,245 | 490,830 | 480,430 | 471,315 |
| Total Jobs | 3,451,820 | 4,026,060 | 3,422,845 | 4,010,135 | 4,136,190 | 4,267,760 | 4,405,125 | 4,548,565 | 4,698,375 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

# County/CBSA Totals

Solano County.
Credit: Karl Nielsen

## POPULATION — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 1,510,270 | 1,611,320 | 1,515,230 | 1,625,780 | 1,711,460 | 1,776,495 | 1,868,635 | 1,960,630 | 2,092,370 |
| Contra Costa | 1,049,025 | 1,111,900 | 1,051,830 | 1,093,170 | 1,128,660 | 1,198,715 | 1,257,790 | 1,329,330 | 1,387,295 |
| Marin | 252,410 | 262,305 | 252,920 | 262,420 | 265,875 | 269,250 | 274,530 | 278,215 | 282,670 |
| Napa | 136,485 | 140,990 | 135,880 | 136,885 | 141,240 | 146,130 | 151,445 | 155,860 | 158,050 |
| San Francisco | 805,235 | 857,410 | 809,145 | 907,305 | 959,405 | 999,750 | 1,034,175 | 1,085,130 | 1,169,485 |
| San Mateo | 718,450 | 759,610 | 721,195 | 757,895 | 796,925 | 816,460 | 853,260 | 878,020 | 916,590 |
| Santa Clara | 1,781,640 | 1,903,210 | 1,789,150 | 1,909,680 | 1,986,340 | 2,098,695 | 2,217,750 | 2,387,165 | 2,538,320 |
| Solano | 413,345 | 427,120 | 414,585 | 414,465 | 428,305 | 449,890 | 470,495 | 486,840 | 510,660 |
| Sonoma | 483,880 | 500,050 | 484,990 | 483,885 | 502,015 | 528,820 | 561,360 | 581,560 | 597,505 |
| Region | 7,150,740 | 7,573,915 | 7,174,920 | 7,591,490 | 7,920,230 | 8,284,200 | 8,689,440 | 9,142,745 | 9,652,950 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## POPULATION — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 136,485 | 140,990 | 135,880 | 136,885 | 141,240 | 146,130 | 151,445 | 155,860 | 158,050 |
| San Francisco-Oakland-Hayward, CA | 4,335,390 | 4,602,540 | 4,350,320 | 4,646,570 | 4,862,325 | 5,060,665 | 5,288,390 | 5,531,325 | 5,848,415 |
| San José-Sunnyvale-Santa Clara, CA | 1,781,640 | 1,903,210 | 1,789,150 | 1,909,680 | 1,986,340 | 2,098,695 | 2,217,750 | 2,387,165 | 2,538,320 |
| Santa Rosa, CA | 483,880 | 500,050 | 484,990 | 483,885 | 502,015 | 528,820 | 561,360 | 581,560 | 597,505 |
| Vallejo-Fairfield, CA | 413,345 | 427,120 | 414,585 | 414,465 | 428,305 | 449,890 | 470,495 | 486,840 | 510,660 |
| Region | 7,150,740 | 7,573,915 | 7,174,920 | 7,591,490 | 7,920,230 | 8,284,200 | 8,689,440 | 9,142,745 | 9,652,950 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## HOUSEHOLD POPULATION — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 1,469,750 | 1,572,000 | 1,477,230 | 1,585,490 | 1,668,875 | 1,731,595 | 1,821,170 | 1,910,510 | 2,039,275 |
| Contra Costa | 1,038,710 | 1,100,930 | 1,042,275 | 1,083,080 | 1,117,995 | 1,187,440 | 1,245,855 | 1,316,715 | 1,373,965 |
| Marin | 243,365 | 253,990 | 244,165 | 253,255 | 256,415 | 259,475 | 264,390 | 267,730 | 271,805 |
| Napa | 131,565 | 136,020 | 132,430 | 133,235 | 137,380 | 142,050 | 147,125 | 151,295 | 153,220 |
| San Francisco | 779,455 | 832,320 | 785,245 | 882,705 | 933,380 | 972,250 | 1,005,100 | 1,054,385 | 1,136,455 |
| San Mateo | 709,600 | 750,115 | 712,200 | 748,400 | 786,875 | 805,875 | 842,060 | 866,210 | 904,125 |
| Santa Clara | 1,751,290 | 1,872,240 | 1,758,350 | 1,877,070 | 1,951,920 | 2,062,295 | 2,179,230 | 2,346,350 | 2,495,105 |
| Solano | 400,890 | 416,070 | 402,160 | 401,365 | 414,465 | 435,250 | 455,025 | 470,490 | 493,380 |
| Sonoma | 473,835 | 489,615 | 475,305 | 473,680 | 491,230 | 517,410 | 549,290 | 568,810 | 584,045 |
| Region | 6,998,465 | 7,423,305 | 7,029,350 | 7,438,280 | 7,758,540 | 8,113,640 | 8,509,245 | 8,952,495 | 9,451,375 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## HOUSEHOLD POPULATION — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 131,565 | 136,020 | 132,430 | 133,235 | 137,380 | 142,050 | 147,125 | 151,295 | 153,220 |
| San Francisco-Oakland-Hayward, CA | 4,240,880 | 4,509,355 | 4,261,115 | 4,552,930 | 4,763,545 | 4,956,635 | 5,178,580 | 5,415,550 | 5,725,625 |
| San José-Sunnyvale-Santa Clara, CA | 1,751,290 | 1,872,240 | 1,758,350 | 1,877,070 | 1,951,920 | 2,062,295 | 2,179,230 | 2,346,350 | 2,495,105 |
| Santa Rosa, CA | 473,835 | 489,615 | 475,305 | 473,680 | 491,230 | 517,410 | 549,290 | 568,810 | 584,045 |
| Vallejo-Fairfield, CA | 400,890 | 416,070 | 402,160 | 401,365 | 414,465 | 435,250 | 455,025 | 470,490 | 493,380 |
| Region | 6,998,465 | 7,423,305 | 7,029,350 | 7,438,280 | 7,758,540 | 8,113,640 | 8,509,245 | 8,952,495 | 9,451,375 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## HOUSEHOLDS — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 544,045 | 562,525 | 545,140 | 585,475 | 614,965 | 637,395 | 668,285 | 696,370 | 734,210 |
| Contra Costa | 375,365 | 387,920 | 375,365 | 386,755 | 399,615 | 422,435 | 440,765 | 461,065 | 475,390 |
| Marin | 103,210 | 103,110 | 103,210 | 106,790 | 108,195 | 109,375 | 111,065 | 111,350 | 111,585 |
| Napa | 48,875 | 49,800 | 48,875 | 48,750 | 50,365 | 52,080 | 53,710 | 54,670 | 54,625 |
| San Francisco | 345,170 | 355,580 | 345,810 | 388,515 | 408,600 | 425,185 | 437,505 | 453,770 | 483,695 |
| San Mateo | 257,835 | 260,110 | 257,835 | 270,715 | 284,260 | 290,330 | 302,520 | 308,410 | 317,965 |
| Santa Clara | 604,205 | 623,120 | 604,205 | 648,900 | 679,425 | 718,565 | 757,690 | 815,980 | 860,810 |
| Solano | 141,760 | 146,155 | 141,760 | 141,105 | 145,880 | 153,180 | 159,380 | 163,360 | 169,365 |
| Sonoma | 185,825 | 190,485 | 185,825 | 183,475 | 190,660 | 200,510 | 211,100 | 216,155 | 219,060 |
| Region | 2,606,290 | 2,678,810 | 2,608,025 | 2,760,480 | 2,881,965 | 3,009,055 | 3,142,015 | 3,281,130 | 3,426,700 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## HOUSEHOLDS — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 48,875 | 49,800 | 48,875 | 48,750 | 50,365 | 52,080 | 53,710 | 54,670 | 54,625 |
| San Francisco-Oakland-Hayward, CA | 1,625,625 | 1,669,250 | 1,627,360 | 1,738,250 | 1,815,635 | 1,884,720 | 1,960,135 | 2,030,970 | 2,122,840 |
| San José-Sunnyvale-Santa Clara, CA | 604,205 | 623,120 | 604,205 | 648,900 | 679,425 | 718,565 | 757,690 | 815,980 | 860,810 |
| Santa Rosa, CA | 185,825 | 190,485 | 185,825 | 183,475 | 190,660 | 200,510 | 211,100 | 216,155 | 219,060 |
| Vallejo-Fairfield, CA | 141,760 | 146,155 | 141,760 | 141,105 | 145,880 | 153,180 | 159,380 | 163,360 | 169,365 |
| Region | 2,606,290 | 2,678,810 | 2,608,025 | 2,760,480 | 2,881,965 | 3,009,055 | 3,142,015 | 3,281,130 | 3,426,700 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## HOUSEHOLDS — PRIORITY DEVELOPMENT AREAS TOTALS (PDAS)

| County | PDAs | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| Alameda | In PDA | 171,950 | 205,975 | 227,725 | 245,840 | 270,285 | 297,655 | 334,515 |
| Alameda | Not PDA | 373,185 | 379,500 | 387,240 | 391,555 | 397,995 | 398,720 | 399,690 |
| Contra Costa | In PDA | 36,505 | 46,315 | 51,275 | 68,050 | 78,830 | 88,615 | 101,225 |
| Contra Costa | Not PDA | 338,860 | 340,440 | 348,340 | 354,385 | 361,935 | 372,450 | 374,160 |
| Marin | In PDA | 3,080 | 3,360 | 3,405 | 3,785 | 4,100 | 4,250 | 4,355 |
| Marin | Not PDA | 100,130 | 103,430 | 104,790 | 105,590 | 106,970 | 107,095 | 107,230 |
| Napa | In PDA | 780 | 780 | 810 | 840 | 895 | 1,035 | 1,205 |
| Napa | Not PDA | 48,095 | 47,965 | 49,555 | 51,240 | 52,815 | 53,630 | 53,420 |
| San Francisco | In PDA | 182,430 | 218,655 | 237,140 | 252,750 | 264,240 | 279,920 | 310,125 |
| San Francisco | Not PDA | 163,385 | 169,860 | 171,460 | 172,435 | 173,265 | 173,855 | 173,570 |
| San Mateo | In PDA | 43,835 | 49,925 | 58,595 | 61,755 | 68,600 | 73,290 | 80,045 |
| San Mateo | Not PDA | 214,005 | 220,790 | 225,670 | 228,580 | 233,920 | 235,125 | 237,920 |
| Santa Clara | In PDA | 85,705 | 124,080 | 139,055 | 169,770 | 200,520 | 251,170 | 294,180 |
| Santa Clara | Not PDA | 518,500 | 524,820 | 540,370 | 548,795 | 557,175 | 564,805 | 566,630 |
| Solano | In PDA | 5,680 | 5,675 | 6,055 | 7,650 | 9,155 | 9,715 | 11,800 |
| Solano | Not PDA | 136,080 | 135,435 | 139,825 | 145,530 | 150,220 | 153,645 | 157,565 |
| Sonoma | In PDA | 22,860 | 26,450 | 27,945 | 32,400 | 37,975 | 42,150 | 44,810 |
| Sonoma | Not PDA | 162,965 | 157,025 | 162,715 | 168,105 | 173,125 | 174,005 | 174,255 |
| Region | In PDA | 552,825 | 681,215 | 752,005 | 842,840 | 934,600 | 1,047,800 | 1,182,260 |
| Region | Not PDA | 2,055,205 | 2,079,265 | 2,129,965 | 2,166,215 | 2,207,420 | 2,233,330 | 2,244,440 |

Source: Model estimates from *Plan Bay Area 2040* data.

## PERSONS PER HOUSEHOLD — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 2.70 | 2.79 | 2.71 | 2.71 | 2.71 | 2.72 | 2.73 | 2.74 | 2.78 |
| Contra Costa | 2.77 | 2.84 | 2.78 | 2.80 | 2.80 | 2.81 | 2.83 | 2.86 | 2.89 |
| Marin | 2.36 | 2.46 | 2.37 | 2.37 | 2.37 | 2.37 | 2.38 | 2.40 | 2.44 |
| Napa | 2.69 | 2.73 | 2.71 | 2.73 | 2.73 | 2.73 | 2.74 | 2.77 | 2.80 |
| San Francisco | 2.26 | 2.34 | 2.27 | 2.27 | 2.28 | 2.29 | 2.30 | 2.32 | 2.35 |
| San Mateo | 2.75 | 2.88 | 2.76 | 2.76 | 2.77 | 2.78 | 2.78 | 2.81 | 2.84 |
| Santa Clara | 2.90 | 3.00 | 2.91 | 2.89 | 2.87 | 2.87 | 2.88 | 2.88 | 2.90 |
| Solano | 2.83 | 2.85 | 2.84 | 2.84 | 2.84 | 2.84 | 2.85 | 2.88 | 2.91 |
| Sonoma | 2.55 | 2.57 | 2.56 | 2.58 | 2.58 | 2.58 | 2.60 | 2.63 | 2.67 |
| Region | 2.69 | 2.77 | 2.70 | 2.69 | 2.69 | 2.70 | 2.71 | 2.73 | 2.76 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## PERSONS PER HOUSEHOLD — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 2.69 | 2.73 | 2.71 | 2.73 | 2.73 | 2.73 | 2.74 | 2.77 | 2.80 |
| San Francisco-Oakland-Hayward, CA | 2.61 | 2.70 | 2.62 | 2.62 | 2.62 | 2.63 | 2.64 | 2.67 | 2.70 |
| San José-Sunnyvale-Santa Clara, CA | 2.90 | 3.00 | 2.91 | 2.89 | 2.87 | 2.87 | 2.88 | 2.88 | 2.90 |
| Santa Rosa, CA | 2.55 | 2.57 | 2.56 | 2.58 | 2.58 | 2.58 | 2.60 | 2.63 | 2.67 |
| Vallejo-Fairfield, CA | 2.83 | 2.85 | 2.84 | 2.84 | 2.84 | 2.84 | 2.85 | 2.88 | 2.91 |
| Region | 2.69 | 2.77 | 2.70 | 2.69 | 2.69 | 2.70 | 2.71 | 2.73 | 2.76 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## EMPLOYED RESIDENTS — COUNTIES

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| County | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 727,800 | 827,795 | 723,810 | 878,975 | 911,725 | 929,230 | 959,745 | 985,760 | 1,022,040 |
| Contra Costa | 487,735 | 536,210 | 497,445 | 579,075 | 589,810 | 617,185 | 633,830 | 655,135 | 665,875 |
| Marin | 125,625 | 130,745 | 109,320 | 129,925 | 130,665 | 131,210 | 132,390 | 132,130 | 131,575 |
| Napa | 65,555 | 71,145 | 66,455 | 73,680 | 74,670 | 75,530 | 76,370 | 76,655 | 75,565 |
| San Francisco | 450,230 | 505,330 | 414,370 | 528,680 | 552,690 | 567,530 | 576,950 | 591,035 | 620,260 |
| San Mateo | 367,940 | 405,185 | 332,760 | 396,885 | 415,275 | 420,235 | 433,655 | 437,190 | 446,040 |
| Santa Clara | 859,035 | 967,865 | 791,100 | 952,540 | 977,955 | 1,022,260 | 1,064,430 | 1,126,185 | 1,173,565 |
| Solano | 189,565 | 200,570 | 200,780 | 221,745 | 224,840 | 230,995 | 235,875 | 237,755 | 242,485 |
| Sonoma | 233,200 | 250,010 | 240,345 | 265,500 | 269,375 | 276,420 | 284,620 | 287,085 | 286,490 |
| Region | 3,506,680 | 3,894,850 | 3,376,380 | 4,026,995 | 4,147,000 | 4,270,595 | 4,397,865 | 4,528,925 | 4,663,900 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## EMPLOYED RESIDENTS — METROPOLITAN STATISTICAL AREAS (CBSAS)

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| CBSA | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 65,555 | 71,145 | 66,455 | 73,680 | 74,670 | 75,530 | 76,370 | 76,655 | 75,565 |
| San Francisco-Oakland-Hayward, CA | 2,159,325 | 2,405,265 | 2,077,700 | 2,513,535 | 2,600,160 | 2,665,390 | 2,736,570 | 2,801,250 | 2,885,790 |
| San José-Sunnyvale-Santa Clara, CA | 859,035 | 967,865 | 791,100 | 952,540 | 977,955 | 1,022,260 | 1,064,430 | 1,126,185 | 1,173,565 |
| Santa Rosa, CA | 233,200 | 250,010 | 240,345 | 265,500 | 269,375 | 276,420 | 284,620 | 287,085 | 286,490 |
| Vallejo-Fairfield, CA | 189,565 | 200,570 | 200,780 | 221,745 | 224,840 | 230,995 | 235,875 | 237,755 | 242,485 |
| Region | 3,506,680 | 3,894,850 | 3,376,380 | 4,026,995 | 4,147,000 | 4,270,595 | 4,397,865 | 4,528,925 | 4,663,900 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## AGRICULTURE & NATURAL RESOURCES — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 1,025 | 710 | 895 | 1,240 | 1,245 | 1,235 | 1,245 | 1,250 | 1,240 |
| Contra Costa | 1,660 | 1,550 | 1,195 | 1,450 | 1,450 | 1,455 | 1,450 | 1,430 | 1,440 |
| Marin | 505 | 355 | 610 | 710 | 705 | 705 | 700 | 710 | 705 |
| Napa | 3,995 | 3,900 | 4,935 | 4,940 | 4,910 | 4,880 | 4,850 | 4,820 | 4,795 |
| San Francisco | 475 | 390 | 505 | 650 | 640 | 640 | 630 | 630 | 625 |
| San Mateo | 1,625 | 1,440 | 2,300 | 2,475 | 2,460 | 2,455 | 2,450 | 2,435 | 2,440 |
| Santa Clara | 2,500 | 2,205 | 4,255 | 5,055 | 5,030 | 4,985 | 4,965 | 4,920 | 4,890 |
| Solano | 1,295 | 1,985 | 1,815 | 1,935 | 1,945 | 1,955 | 1,950 | 1,970 | 1,975 |
| Sonoma | 4,695 | 6,370 | 6,290 | 6,530 | 6,490 | 6,430 | 6,375 | 6,340 | 6,275 |
| Region | 17,775 | 18,905 | 22,800 | 24,990 | 24,865 | 24,740 | 24,620 | 24,500 | 24,380 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## AGRICULTURE & NATURAL RESOURCES — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 3,995 | 3,900 | 4,935 | 4,940 | 4,910 | 4,880 | 4,850 | 4,820 | 4,795 |
| San Francisco-Oakland-Hayward, CA | 5,285 | 4,445 | 5,505 | 6,525 | 6,495 | 6,490 | 6,480 | 6,450 | 6,445 |
| San José-Sunnyvale-Santa Clara, CA | 2,500 | 2,205 | 4,255 | 5,055 | 5,030 | 4,985 | 4,965 | 4,920 | 4,890 |
| Santa Rosa, CA | 4,695 | 6,370 | 6,290 | 6,530 | 6,490 | 6,430 | 6,375 | 6,340 | 6,275 |
| Vallejo-Fairfield, CA | 1,295 | 1,985 | 1,815 | 1,935 | 1,945 | 1,955 | 1,950 | 1,970 | 1,975 |
| Region | 17,775 | 18,905 | 22,800 | 24,990 | 24,865 | 24,740 | 24,620 | 24,500 | 24,380 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## CONSTRUCTION — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 36,980 | 46,540 | 37,745 | 50,400 | 52,075 | 54,350 | 58,475 | 64,460 | 69,985 |
| Contra Costa | 20,835 | 26,185 | 19,305 | 25,130 | 26,080 | 27,430 | 30,750 | 35,840 | 39,010 |
| Marin | 7,645 | 7,570 | 5,530 | 6,925 | 7,110 | 7,425 | 7,815 | 8,255 | 8,640 |
| Napa | 2,345 | 3,965 | 4,910 | 6,110 | 6,400 | 6,750 | 7,390 | 8,395 | 9,075 |
| San Francisco | 16,345 | 23,320 | 10,185 | 14,330 | 14,610 | 15,320 | 16,715 | 20,225 | 23,320 |
| San Mateo | 18,645 | 26,860 | 14,200 | 17,560 | 18,490 | 19,295 | 20,360 | 23,635 | 27,340 |
| Santa Clara | 37,275 | 47,940 | 48,660 | 63,555 | 66,395 | 70,035 | 74,695 | 81,495 | 92,275 |
| Solano | 9,195 | 14,390 | 8,375 | 10,015 | 10,210 | 10,655 | 11,555 | 12,845 | 13,775 |
| Sonoma | 8,975 | 11,465 | 16,205 | 20,945 | 22,295 | 23,720 | 25,645 | 28,105 | 29,990 |
| Region | 158,235 | 208,230 | 165,115 | 214,970 | 223,660 | 234,985 | 253,405 | 283,260 | 313,405 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## CONSTRUCTION — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 2,345 | 3,965 | 4,910 | 6,110 | 6,400 | 6,750 | 7,390 | 8,395 | 9,075 |
| San Francisco-Oakland-Hayward, CA | 100,445 | 130,470 | 86,965 | 114,345 | 118,365 | 123,820 | 134,115 | 152,415 | 168,295 |
| San José-Sunnyvale-Santa Clara, CA | 37,275 | 47,940 | 48,660 | 63,555 | 66,395 | 70,035 | 74,695 | 81,495 | 92,275 |
| Santa Rosa, CA | 8,975 | 11,465 | 16,205 | 20,945 | 22,295 | 23,720 | 25,645 | 28,105 | 29,990 |
| Vallejo-Fairfield, CA | 9,195 | 14,390 | 8,375 | 10,015 | 10,210 | 10,655 | 11,555 | 12,845 | 13,775 |
| Region | 158,235 | 208,230 | 165,115 | 214,970 | 223,660 | 234,985 | 253,405 | 283,260 | 313,405 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## MANUFACTURING & WHOLESALE — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 109,460 | 124,780 | 101,150 | 101,680 | 105,125 | 106,955 | 108,325 | 108,565 | 107,600 |
| Contra Costa | 28,265 | 27,780 | 25,670 | 25,795 | 25,745 | 25,845 | 26,310 | 26,590 | 26,045 |
| Marin | 5,565 | 7,705 | 4,210 | 4,230 | 4,175 | 4,235 | 4,220 | 4,055 | 3,950 |
| Napa | 8,215 | 7,905 | 12,535 | 11,655 | 11,850 | 11,970 | 12,190 | 12,720 | 12,665 |
| San Francisco | 23,230 | 29,280 | 19,985 | 20,720 | 19,355 | 18,665 | 17,435 | 16,150 | 14,715 |
| San Mateo | 43,190 | 44,120 | 37,985 | 34,025 | 32,230 | 30,895 | 29,145 | 27,535 | 26,135 |
| Santa Clara | 205,440 | 208,310 | 184,345 | 185,300 | 182,740 | 181,750 | 179,490 | 176,330 | 176,365 |
| Solano | 14,180 | 17,160 | 14,225 | 13,885 | 14,485 | 15,310 | 16,105 | 17,145 | 17,320 |
| Sonoma | 24,175 | 26,015 | 28,440 | 26,305 | 25,590 | 25,000 | 24,440 | 24,015 | 23,485 |
| Region | 461,715 | 493,060 | 428,550 | 423,600 | 421,295 | 420,630 | 417,655 | 413,115 | 408,280 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## MANUFACTURING & WHOLESALE — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 8,215 | 7,905 | 12,535 | 11,655 | 11,850 | 11,970 | 12,190 | 12,720 | 12,665 |
| San Francisco-Oakland-Hayward, CA | 209,710 | 233,670 | 189,005 | 186,455 | 186,630 | 186,605 | 185,435 | 182,900 | 178,445 |
| San José-Sunnyvale-Santa Clara, CA | 205,440 | 208,310 | 184,345 | 185,300 | 182,740 | 181,750 | 179,490 | 176,330 | 176,365 |
| Santa Rosa, CA | 24,175 | 26,015 | 28,440 | 26,305 | 25,590 | 25,000 | 24,440 | 24,015 | 23,485 |
| Vallejo-Fairfield, CA | 14,180 | 17,160 | 14,225 | 13,885 | 14,485 | 15,310 | 16,105 | 17,145 | 17,320 |
| Region | 461,715 | 493,060 | 428,550 | 423,600 | 421,295 | 420,630 | 417,655 | 413,115 | 408,280 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## RETAIL — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 68,730 | 78,500 | 64,900 | 72,570 | 74,560 | 75,685 | 78,075 | 80,405 | 83,115 |
| Contra Costa | 46,405 | 48,415 | 42,410 | 45,825 | 45,985 | 47,140 | 48,140 | 49,380 | 50,180 |
| Marin | 16,595 | 16,255 | 14,930 | 14,195 | 13,830 | 13,365 | 12,840 | 12,305 | 12,085 |
| Napa | 6,980 | 6,515 | 6,280 | 7,590 | 7,705 | 7,685 | 7,660 | 7,640 | 7,520 |
| San Francisco | 46,070 | 55,240 | 42,565 | 48,640 | 50,985 | 52,755 | 53,685 | 54,515 | 56,485 |
| San Mateo | 37,585 | 38,055 | 34,625 | 36,515 | 37,530 | 38,120 | 39,220 | 39,420 | 39,675 |
| Santa Clara | 86,520 | 93,535 | 80,050 | 88,905 | 91,160 | 94,310 | 97,215 | 101,670 | 104,815 |
| Solano | 17,950 | 20,985 | 16,630 | 18,090 | 18,430 | 18,710 | 18,845 | 18,810 | 19,015 |
| Sonoma | 25,110 | 28,495 | 23,255 | 24,225 | 24,325 | 24,880 | 25,295 | 25,335 | 25,280 |
| Region | 351,945 | 385,995 | 325,645 | 356,555 | 364,515 | 372,655 | 380,975 | 389,480 | 398,175 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## RETAIL — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 6,980 | 6,515 | 6,280 | 7,590 | 7,705 | 7,685 | 7,660 | 7,640 | 7,520 |
| San Francisco-Oakland-Hayward, CA | 215,380 | 236,465 | 199,425 | 217,745 | 222,890 | 227,065 | 231,955 | 236,025 | 241,545 |
| San José-Sunnyvale-Santa Clara, CA | 86,520 | 93,535 | 80,050 | 88,905 | 91,160 | 94,310 | 97,215 | 101,670 | 104,815 |
| Santa Rosa, CA | 25,110 | 28,495 | 23,255 | 24,225 | 24,325 | 24,880 | 25,295 | 25,335 | 25,280 |
| Vallejo-Fairfield, CA | 17,950 | 20,985 | 16,630 | 18,090 | 18,430 | 18,710 | 18,845 | 18,810 | 19,015 |
| Region | 351,945 | 385,995 | 325,645 | 356,555 | 364,515 | 372,655 | 380,975 | 389,480 | 398,175 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## TRANSPORTATION & UTILITIES — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 26,360 | 29,370 | 20,090 | 21,800 | 23,075 | 23,460 | 24,420 | 25,530 | 26,525 |
| Contra Costa | 7,115 | 8,010 | 10,885 | 11,625 | 11,940 | 12,040 | 12,680 | 13,500 | 14,095 |
| Marin | 1,530 | 1,190 | 2,285 | 2,445 | 2,470 | 2,510 | 2,575 | 2,605 | 2,690 |
| Napa | 1,045 | 1,510 | 1,845 | 2,090 | 2,195 | 2,245 | 2,390 | 2,650 | 2,830 |
| San Francisco | 13,590 | 15,585 | 12,270 | 13,310 | 12,710 | 12,230 | 11,735 | 11,390 | 10,995 |
| San Mateo | 21,490 | 26,005 | 25,960 | 24,565 | 23,905 | 22,975 | 22,385 | 22,225 | 22,565 |
| Santa Clara | 12,770 | 15,430 | 14,295 | 15,485 | 15,845 | 15,985 | 16,560 | 17,370 | 18,570 |
| Solano | 4,105 | 4,510 | 4,660 | 4,835 | 5,180 | 5,500 | 5,980 | 6,715 | 7,215 |
| Sonoma | 4,195 | 4,160 | 4,835 | 4,720 | 4,710 | 4,605 | 4,640 | 4,795 | 4,975 |
| Region | 92,200 | 105,775 | 97,135 | 100,875 | 102,025 | 101,545 | 103,370 | 106,770 | 110,460 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## TRANSPORTATION & UTILITIES — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 1,045 | 1,510 | 1,845 | 2,090 | 2,195 | 2,245 | 2,390 | 2,650 | 2,830 |
| San Francisco-Oakland-Hayward, CA | 70,085 | 80,160 | 71,495 | 73,745 | 74,095 | 73,210 | 73,805 | 75,245 | 76,870 |
| San José-Sunnyvale-Santa Clara, CA | 12,770 | 15,430 | 14,295 | 15,485 | 15,845 | 15,985 | 16,560 | 17,370 | 18,570 |
| Santa Rosa, CA | 4,195 | 4,160 | 4,835 | 4,720 | 4,710 | 4,605 | 4,640 | 4,795 | 4,975 |
| Vallejo-Fairfield, CA | 4,105 | 4,510 | 4,660 | 4,835 | 5,180 | 5,500 | 5,980 | 6,715 | 7,215 |
| Region | 92,200 | 105,775 | 97,135 | 100,875 | 102,025 | 101,545 | 103,370 | 106,770 | 110,460 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## INFORMATION — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 16,150 | 16,435 | 18,215 | 27,020 | 26,180 | 25,950 | 26,235 | 25,310 | 24,360 |
| Contra Costa | 11,220 | 9,895 | 18,315 | 23,555 | 23,455 | 22,245 | 22,410 | 24,275 | 22,785 |
| Marin | 2,425 | 3,015 | 4,845 | 6,685 | 6,475 | 6,460 | 6,415 | 5,965 | 5,565 |
| Napa | 535 | 270 | 1,070 | 1,510 | 1,495 | 1,515 | 1,565 | 1,580 | 1,525 |
| San Francisco | 22,655 | 37,050 | 16,290 | 24,575 | 23,620 | 23,690 | 24,400 | 26,075 | 27,015 |
| San Mateo | 18,565 | 30,710 | 14,500 | 19,195 | 18,735 | 18,420 | 18,055 | 18,375 | 18,490 |
| Santa Clara | 51,165 | 72,605 | 38,055 | 56,420 | 55,720 | 56,725 | 57,190 | 55,415 | 56,945 |
| Solano | 1,870 | 1,305 | 1,530 | 2,015 | 1,940 | 1,940 | 1,985 | 1,945 | 1,865 |
| Sonoma | 2,630 | 2,865 | 4,730 | 6,715 | 6,740 | 6,855 | 6,990 | 6,735 | 6,410 |
| Region | 127,220 | 174,155 | 117,545 | 167,695 | 164,360 | 163,800 | 165,255 | 165,675 | 164,965 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## INFORMATION — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 535 | 270 | 1,070 | 1,510 | 1,495 | 1,515 | 1,565 | 1,580 | 1,525 |
| San Francisco-Oakland-Hayward, CA | 71,020 | 97,110 | 72,160 | 101,030 | 98,465 | 96,765 | 97,520 | 100,005 | 98,210 |
| San José-Sunnyvale-Santa Clara, CA | 51,165 | 72,605 | 38,055 | 56,420 | 55,720 | 56,725 | 57,190 | 55,415 | 56,945 |
| Santa Rosa, CA | 2,630 | 2,865 | 4,730 | 6,715 | 6,740 | 6,855 | 6,990 | 6,735 | 6,410 |
| Vallejo-Fairfield, CA | 1,870 | 1,305 | 1,530 | 2,015 | 1,940 | 1,940 | 1,985 | 1,945 | 1,865 |
| Region | 127,220 | 174,155 | 117,545 | 167,695 | 164,360 | 163,800 | 165,255 | 165,675 | 164,965 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## FINANCIAL & LEASING — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 27,640 | 27,230 | 26,255 | 32,635 | 32,780 | 31,160 | 29,930 | 29,865 | 28,770 |
| Contra Costa | 31,155 | 31,350 | 24,740 | 27,710 | 27,470 | 26,295 | 26,560 | 26,060 | 26,320 |
| Marin | 8,825 | 8,330 | 12,020 | 12,255 | 11,865 | 11,100 | 10,670 | 10,385 | 9,820 |
| Napa | 2,455 | 2,560 | 3,470 | 3,170 | 3,025 | 2,790 | 2,600 | 2,455 | 3,145 |
| San Francisco | 59,760 | 61,620 | 55,540 | 84,190 | 90,515 | 91,970 | 90,710 | 89,670 | 86,375 |
| San Mateo | 19,920 | 22,415 | 23,980 | 29,800 | 30,900 | 31,590 | 30,920 | 30,355 | 32,540 |
| Santa Clara | 35,540 | 39,150 | 33,320 | 41,720 | 42,245 | 39,855 | 38,420 | 36,800 | 35,365 |
| Solano | 5,570 | 5,870 | 6,460 | 6,420 | 6,285 | 6,060 | 5,880 | 5,810 | 5,485 |
| Sonoma | 9,070 | 9,375 | 8,500 | 8,660 | 8,490 | 7,940 | 7,475 | 7,105 | 6,735 |
| Region | 199,940 | 207,910 | 194,285 | 246,565 | 253,580 | 248,760 | 243,165 | 238,500 | 234,545 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## FINANCIAL & LEASING — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 2,455 | 2,560 | 3,470 | 3,170 | 3,025 | 2,790 | 2,600 | 2,455 | 3,145 |
| San Francisco-Oakland-Hayward, CA | 147,305 | 150,950 | 142,535 | 186,590 | 193,535 | 192,115 | 188,790 | 186,335 | 183,825 |
| San José-Sunnyvale-Santa Clara, CA | 35,540 | 39,150 | 33,320 | 41,720 | 42,245 | 39,855 | 38,420 | 36,800 | 35,365 |
| Santa Rosa, CA | 9,070 | 9,375 | 8,500 | 8,660 | 8,490 | 7,940 | 7,475 | 7,105 | 6,735 |
| Vallejo-Fairfield, CA | 5,570 | 5,870 | 6,460 | 6,420 | 6,285 | 6,060 | 5,880 | 5,810 | 5,485 |
| Region | 199,940 | 207,910 | 194,285 | 246,565 | 253,580 | 248,760 | 243,165 | 238,500 | 234,545 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## PROFESSIONAL & MANAGERIAL SERVICES — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 119,160 | 147,250 | 123,920 | 172,315 | 172,970 | 174,600 | 177,975 | 187,605 | 190,600 |
| Contra Costa | 51,535 | 59,305 | 60,350 | 76,340 | 76,460 | 78,965 | 85,930 | 90,370 | 97,145 |
| Marin | 21,395 | 21,205 | 20,825 | 24,430 | 23,855 | 23,970 | 24,805 | 25,795 | 25,950 |
| Napa | 4,860 | 6,190 | 5,885 | 5,755 | 5,515 | 5,440 | 5,440 | 5,370 | 7,255 |
| San Francisco | 140,290 | 209,965 | 129,190 | 217,590 | 233,525 | 252,155 | 264,770 | 277,085 | 282,200 |
| San Mateo | 65,715 | 84,560 | 67,660 | 94,750 | 99,420 | 109,115 | 114,640 | 120,790 | 137,020 |
| Santa Clara | 182,775 | 226,980 | 178,945 | 259,990 | 268,620 | 277,310 | 290,775 | 300,025 | 310,930 |
| Solano | 12,880 | 13,075 | 9,675 | 10,730 | 10,545 | 10,855 | 11,260 | 11,825 | 11,815 |
| Sonoma | 20,535 | 19,375 | 26,665 | 30,365 | 29,875 | 29,850 | 30,050 | 30,420 | 30,520 |
| Region | 619,135 | 787,900 | 623,120 | 892,265 | 920,790 | 962,260 | 1,005,650 | 1,049,290 | 1,093,435 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## PROFESSIONAL & MANAGERIAL SERVICES — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 4,860 | 6,190 | 5,885 | 5,755 | 5,515 | 5,440 | 5,440 | 5,370 | 7,255 |
| San Francisco-Oakland-Hayward, CA | 398,085 | 522,285 | 401,950 | 585,425 | 606,230 | 638,805 | 668,120 | 701,650 | 732,915 |
| San José-Sunnyvale-Santa Clara, CA | 182,775 | 226,980 | 178,945 | 259,990 | 268,620 | 277,310 | 290,775 | 300,025 | 310,930 |
| Santa Rosa, CA | 20,535 | 19,375 | 26,665 | 30,365 | 29,875 | 29,850 | 30,050 | 30,420 | 30,520 |
| Vallejo-Fairfield, CA | 12,880 | 13,075 | 9,675 | 10,730 | 10,545 | 10,855 | 11,260 | 11,825 | 11,815 |
| Region | 619,135 | 787,900 | 623,120 | 892,265 | 920,790 | 962,260 | 1,005,650 | 1,049,290 | 1,093,435 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## HEALTH & EDUCATIONAL SERVICES — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 112,595 | 134,290 | 109,835 | 132,975 | 145,250 | 156,010 | 167,190 | 183,665 | 197,755 |
| Contra Costa | 59,835 | 75,795 | 59,060 | 65,815 | 71,420 | 76,100 | 88,985 | 98,230 | 104,680 |
| Marin | 20,870 | 24,605 | 21,835 | 23,175 | 24,805 | 26,425 | 28,385 | 30,475 | 32,435 |
| Napa | 15,625 | 19,045 | 8,830 | 9,095 | 9,750 | 10,260 | 10,930 | 12,190 | 14,305 |
| San Francisco | 70,110 | 98,765 | 90,305 | 106,395 | 119,350 | 131,900 | 137,795 | 143,090 | 148,715 |
| San Mateo | 39,915 | 49,235 | 44,010 | 48,640 | 54,470 | 59,500 | 63,105 | 67,960 | 77,740 |
| Santa Clara | 124,700 | 161,415 | 126,920 | 149,345 | 163,090 | 178,490 | 193,240 | 208,840 | 230,225 |
| Solano | 22,585 | 29,920 | 20,935 | 20,330 | 21,685 | 23,125 | 25,055 | 28,015 | 29,680 |
| Sonoma | 28,700 | 38,430 | 30,675 | 34,260 | 37,855 | 40,805 | 44,150 | 48,615 | 52,055 |
| Region | 494,930 | 631,500 | 512,405 | 590,035 | 647,675 | 702,615 | 758,840 | 821,080 | 887,590 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## HEALTH & EDUCATIONAL SERVICES — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 15,625 | 19,045 | 8,830 | 9,095 | 9,750 | 10,260 | 10,930 | 12,190 | 14,305 |
| San Francisco-Oakland-Hayward, CA | 303,325 | 382,690 | 325,040 | 377,005 | 415,295 | 449,930 | 485,460 | 523,420 | 561,325 |
| San José-Sunnyvale-Santa Clara, CA | 124,700 | 161,415 | 126,920 | 149,345 | 163,090 | 178,490 | 193,240 | 208,840 | 230,225 |
| Santa Rosa, CA | 28,700 | 38,430 | 30,675 | 34,260 | 37,855 | 40,805 | 44,150 | 48,615 | 52,055 |
| Vallejo-Fairfield, CA | 22,585 | 29,920 | 20,935 | 20,330 | 21,685 | 23,125 | 25,055 | 28,015 | 29,680 |
| Region | 494,930 | 631,500 | 512,405 | 590,035 | 647,675 | 702,615 | 758,840 | 821,080 | 887,590 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## ARTS, RECREATION & OTHER SERVICES — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 104,115 | 106,120 | 90,635 | 101,500 | 102,390 | 103,825 | 106,790 | 111,510 | 113,730 |
| Contra Costa | 56,585 | 60,690 | 52,610 | 54,685 | 54,645 | 54,805 | 61,055 | 64,155 | 64,150 |
| Marin | 23,465 | 24,355 | 20,185 | 19,880 | 19,575 | 19,630 | 20,070 | 20,350 | 20,380 |
| Napa | 16,515 | 21,325 | 12,880 | 11,715 | 11,515 | 11,380 | 11,500 | 11,935 | 13,110 |
| San Francisco | 133,370 | 138,470 | 97,895 | 107,765 | 109,005 | 111,435 | 108,745 | 104,750 | 101,205 |
| San Mateo | 53,975 | 62,960 | 46,690 | 48,200 | 49,705 | 51,195 | 51,785 | 52,450 | 56,660 |
| Santa Clara | 119,750 | 130,720 | 112,950 | 128,140 | 132,380 | 140,410 | 147,935 | 155,245 | 166,215 |
| Solano | 22,090 | 24,710 | 21,230 | 19,255 | 18,930 | 19,050 | 19,690 | 20,830 | 20,795 |
| Sonoma | 36,590 | 41,395 | 30,645 | 31,755 | 32,305 | 32,805 | 33,790 | 35,240 | 35,570 |
| Region | 566,460 | 610,745 | 485,720 | 522,895 | 530,455 | 544,530 | 561,365 | 576,465 | 591,820 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## ARTS, RECREATION & OTHER SERVICES — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 16,515 | 21,325 | 12,880 | 11,715 | 11,515 | 11,380 | 11,500 | 11,935 | 13,110 |
| San Francisco-Oakland-Hayward, CA | 371,505 | 392,595 | 308,010 | 332,030 | 335,325 | 340,885 | 348,450 | 353,215 | 356,130 |
| San José-Sunnyvale-Santa Clara, CA | 119,750 | 130,720 | 112,950 | 128,140 | 132,380 | 140,410 | 147,935 | 155,245 | 166,215 |
| Santa Rosa, CA | 36,590 | 41,395 | 30,645 | 31,755 | 32,305 | 32,805 | 33,790 | 35,240 | 35,570 |
| Vallejo-Fairfield, CA | 22,090 | 24,710 | 21,230 | 19,255 | 18,930 | 19,050 | 19,690 | 20,830 | 20,795 |
| Region | 566,460 | 610,745 | 485,720 | 522,895 | 530,455 | 544,530 | 561,365 | 576,465 | 591,820 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## GOVERNMENT — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 82,680 | 93,810 | 112,225 | 120,385 | 123,350 | 124,320 | 122,720 | 115,840 | 109,500 |
| Contra Costa | 46,310 | 47,465 | 45,545 | 48,135 | 49,580 | 51,480 | 53,955 | 53,975 | 52,320 |
| Marin | 12,615 | 16,325 | 14,460 | 14,580 | 14,975 | 15,230 | 14,930 | 13,705 | 12,695 |
| Napa | 7,145 | 7,045 | 7,985 | 7,195 | 7,490 | 7,630 | 7,690 | 7,465 | 7,095 |
| San Francisco | 84,175 | 85,645 | 102,780 | 110,375 | 111,520 | 112,955 | 113,750 | 118,655 | 120,580 |
| San Mateo | 27,245 | 31,190 | 31,465 | 30,170 | 31,570 | 31,880 | 31,090 | 31,235 | 31,740 |
| Santa Clara | 54,850 | 68,515 | 89,010 | 92,825 | 96,680 | 98,810 | 97,510 | 92,595 | 93,010 |
| Solano | 20,125 | 21,060 | 24,710 | 23,255 | 23,645 | 23,985 | 24,140 | 23,280 | 22,095 |
| Sonoma | 27,120 | 30,830 | 22,340 | 22,780 | 24,160 | 24,955 | 25,035 | 23,685 | 22,280 |
| Region | 362,270 | 401,885 | 450,520 | 469,690 | 482,970 | 491,245 | 490,830 | 480,430 | 471,315 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## GOVERNMENT — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 7,145 | 7,045 | 7,985 | 7,195 | 7,490 | 7,630 | 7,690 | 7,465 | 7,095 |
| San Francisco-Oakland-Hayward, CA | 253,025 | 274,435 | 306,475 | 323,645 | 331,000 | 335,870 | 336,445 | 333,405 | 326,835 |
| San José-Sunnyvale-Santa Clara, CA | 54,850 | 68,515 | 89,010 | 92,825 | 96,680 | 98,810 | 97,510 | 92,595 | 93,010 |
| Santa Rosa, CA | 27,120 | 30,830 | 22,340 | 22,780 | 24,160 | 24,955 | 25,035 | 23,685 | 22,280 |
| Vallejo-Fairfield, CA | 20,125 | 21,060 | 24,710 | 23,255 | 23,645 | 23,985 | 24,140 | 23,280 | 22,095 |
| Region | 362,270 | 401,885 | 450,520 | 469,690 | 482,970 | 491,245 | 490,830 | 480,430 | 471,315 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## TOTAL JOBS — COUNTIES

| County | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 704,895 | 805,040 | 705,865 | 834,520 | 858,995 | 877,545 | 901,380 | 934,000 | 953,190 |
| Contra Costa | 360,915 | 396,435 | 360,080 | 406,060 | 414,225 | 423,800 | 458,230 | 483,810 | 498,165 |
| Marin | 121,435 | 130,905 | 121,730 | 129,510 | 129,845 | 131,065 | 133,425 | 134,600 | 134,915 |
| Napa | 69,715 | 80,235 | 70,635 | 70,830 | 71,855 | 72,535 | 74,210 | 77,220 | 83,320 |
| San Francisco | 610,065 | 755,340 | 577,510 | 748,545 | 785,835 | 823,725 | 840,375 | 862,230 | 872,230 |
| San Mateo | 347,860 | 417,550 | 343,380 | 385,900 | 399,415 | 415,430 | 423,160 | 436,420 | 472,340 |
| Santa Clara | 913,290 | 1,066,800 | 910,815 | 1,086,740 | 1,119,900 | 1,158,665 | 1,198,000 | 1,230,705 | 1,289,600 |
| Solano | 131,845 | 154,970 | 130,245 | 130,765 | 133,275 | 137,145 | 142,450 | 149,185 | 151,035 |
| Sonoma | 191,795 | 218,775 | 202,580 | 217,260 | 222,835 | 227,850 | 233,890 | 240,390 | 243,575 |
| Region | 3,451,820 | 4,026,060 | 3,422,845 | 4,010,135 | 4,136,190 | 4,267,760 | 4,405,125 | 4,548,565 | 4,698,375 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## TOTAL JOBS — METROPOLITAN STATISTICAL AREAS (CBSAS)

| CBSA | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Napa, CA | 69,715 | 80,235 | 70,635 | 70,830 | 71,855 | 72,535 | 74,210 | 77,220 | 83,320 |
| San Francisco-Oakland-Hayward, CA | 2,145,175 | 2,505,275 | 2,108,565 | 2,504,535 | 2,588,320 | 2,671,565 | 2,756,575 | 2,851,060 | 2,930,840 |
| San José-Sunnyvale-Santa Clara, CA | 913,290 | 1,066,800 | 910,815 | 1,086,740 | 1,119,900 | 1,158,665 | 1,198,000 | 1,230,705 | 1,289,600 |
| Santa Rosa, CA | 191,795 | 218,775 | 202,580 | 217,260 | 222,835 | 227,850 | 233,890 | 240,390 | 243,575 |
| Vallejo-Fairfield, CA | 131,845 | 154,970 | 130,245 | 130,765 | 133,275 | 137,145 | 142,450 | 149,185 | 151,035 |
| Region | 3,451,820 | 4,026,060 | 3,422,845 | 4,010,135 | 4,136,190 | 4,267,760 | 4,405,125 | 4,548,565 | 4,698,375 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

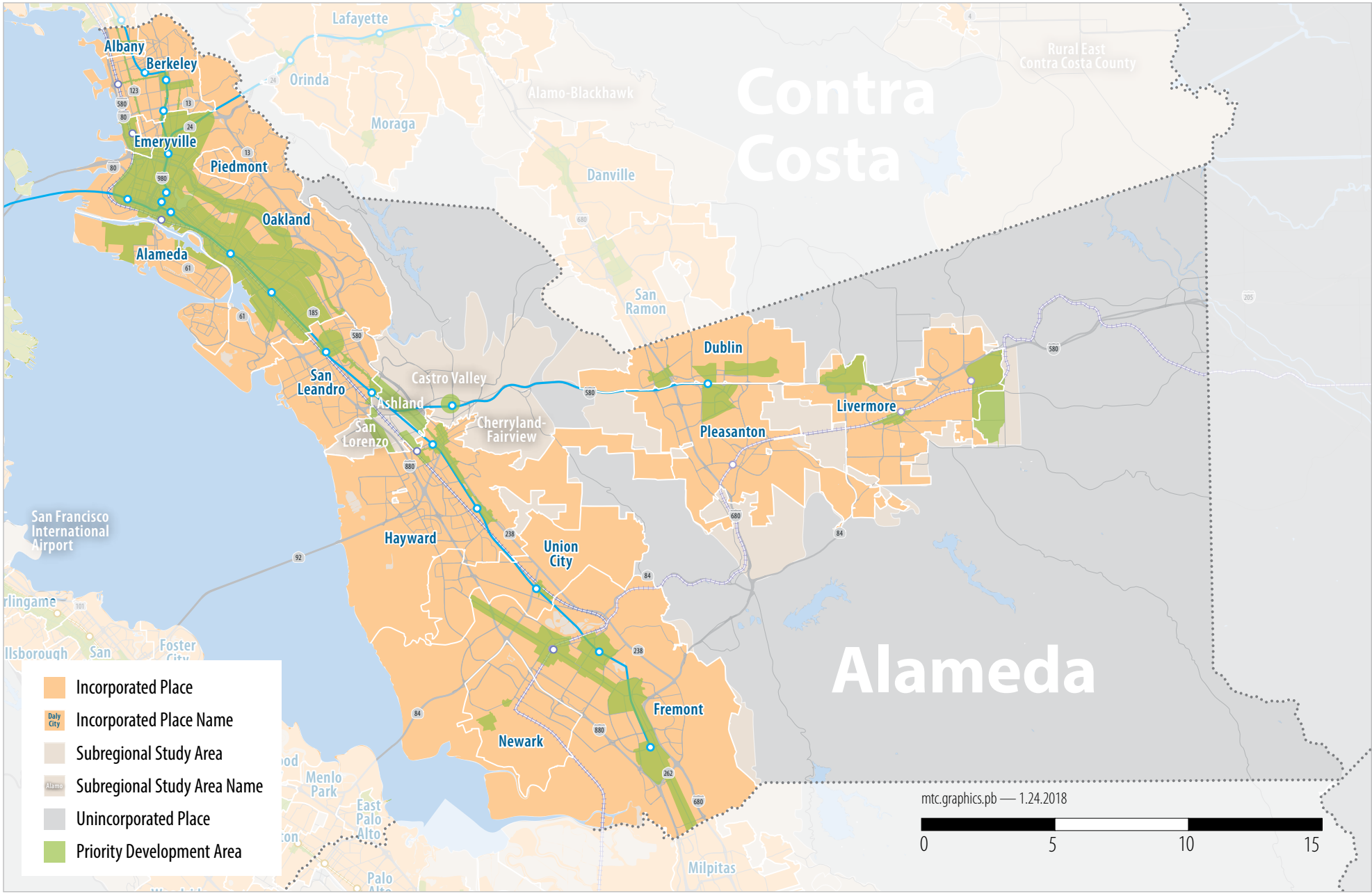
## TOTAL JOBS-PRIORITY DEVELOPMENT AREAS TOTALS (PDAS)

| County | PDAs | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| Alameda | In PDA | 313,880 | 390,695 | 404,610 | 413,625 | 422,695 | 441,825 | 455,105 |
| Alameda | Not PDA | 391,660 | 443,535 | 454,070 | 463,595 | 478,385 | 491,905 | 497,835 |
| Contra Costa | In PDA | 132,920 | 157,535 | 161,360 | 164,905 | 191,195 | 208,420 | 219,910 |
| Contra Costa | Not PDA | 227,310 | 248,590 | 252,930 | 258,940 | 267,060 | 275,390 | 278,200 |
| Marin | In PDA | 9,725 | 10,715 | 10,915 | 10,820 | 10,785 | 10,765 | 10,755 |
| Marin | Not PDA | 112,060 | 118,850 | 118,985 | 120,300 | 122,700 | 123,890 | 124,205 |
| Napa | In PDA | 6,735 | 7,050 | 7,290 | 7,460 | 7,665 | 8,415 | 14,150 |
| Napa | Not PDA | 63,945 | 63,830 | 64,620 | 65,125 | 66,595 | 68,845 | 69,205 |
| San Francisco | In PDA | 473,995 | 626,850 | 663,080 | 699,575 | 714,400 | 734,285 | 741,675 |
| San Francisco | Not PDA | 102,855 | 121,385 | 122,455 | 123,930 | 125,875 | 128,030 | 130,835 |
| San Mateo | In PDA | 99,990 | 109,100 | 113,015 | 120,735 | 122,365 | 126,025 | 139,485 |
| San Mateo | Not PDA | 243,350 | 276,665 | 286,260 | 294,570 | 300,640 | 310,175 | 332,560 |
| Santa Clara | In PDA | 319,345 | 387,265 | 396,400 | 407,065 | 410,500 | 420,075 | 466,760 |
| Santa Clara | Not PDA | 592,185 | 699,960 | 724,015 | 752,050 | 787,870 | 810,925 | 823,110 |
| Solano | In PDA | 24,550 | 25,150 | 26,060 | 27,330 | 27,765 | 28,385 | 28,260 |
| Solano | Not PDA | 105,610 | 105,580 | 107,170 | 109,775 | 114,645 | 120,765 | 122,735 |
| Sonoma | In PDA | 56,595 | 61,155 | 62,455 | 62,795 | 62,620 | 63,030 | 63,650 |
| Sonoma | Not PDA | 146,135 | 156,225 | 160,500 | 165,175 | 171,370 | 177,420 | 179,935 |
| Region | In PDA | 1,437,735 | 1,775,515 | 1,845,185 | 1,914,310 | 1,969,990 | 2,041,225 | 2,139,750 |
| Region | Not PDA | 1,985,110 | 2,234,620 | 2,291,005 | 2,353,460 | 2,435,140 | 2,507,345 | 2,558,620 |

Source: Model estimates from *Plan Bay Area 2040* data.

# County-Level Jurisdiction Totals

Sonoma County
Credit: Karl Nielsen


Albany
Berkeley
Emeryville
Piedmont
Oakland
Alameda
Lafayette
Orinda
Moraga
Alamo-Blackhawk
Danville
San Ramon
Rural East Contra Costa County
Contra Costa
Dublin
Pleasanton
Livermore
Castro Valley
San Leandro
Ashland
San Lorenzo
Cherryland-Fairview
Hayward
Union City
Fremont
Newark
San Francisco International Airport
Menlo Park
East Palo Alto
Palo Alto
Milpitas
Alameda
Incorporated Place
Incorporated Place Name
Subregional Study Area
Subregional Study Area Name
Unincorporated Place
Priority Development Area
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# Alameda County

## ALAMEDA DATA SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 1,510,270 | 1,611,320 | 1,515,230 | 1,625,780 | 1,711,460 | 1,776,495 | 1,868,635 | 1,960,630 | 2,092,370 |
| Household Population | 1,469,750 | 1,572,000 | 1,477,230 | 1,585,490 | 1,668,875 | 1,731,595 | 1,821,170 | 1,910,510 | 2,039,275 |
| Households | 544,045 | 562,525 | 545,140 | 585,475 | 614,965 | 637,395 | 668,285 | 696,370 | 734,210 |
| Persons per Household | 2.70 | 2.79 | 2.71 | 2.71 | 2.71 | 2.72 | 2.73 | 2.74 | 2.78 |
| Employed Residents | 727,800 | 827,795 | 723,810 | 878,975 | 911,725 | 929,230 | 959,745 | 985,760 | 1,022,040 |
| Agriculture & Natural Resources | 1,025 | 710 | 895 | 1,240 | 1,245 | 1,235 | 1,245 | 1,250 | 1,240 |
| Construction | 36,980 | 46,540 | 37,745 | 50,400 | 52,075 | 54,350 | 58,475 | 64,460 | 69,985 |
| Manufacturing & Wholesale | 109,460 | 124,780 | 101,150 | 101,680 | 105,125 | 106,955 | 108,325 | 108,565 | 107,600 |
| Retail | 68,730 | 78,500 | 64,900 | 72,570 | 74,560 | 75,685 | 78,075 | 80,405 | 83,115 |
| Transportation & Utilities | 26,360 | 29,370 | 20,090 | 21,800 | 23,075 | 23,460 | 24,420 | 25,530 | 26,525 |
| Information | 16,150 | 16,435 | 18,215 | 27,020 | 26,180 | 25,950 | 26,235 | 25,310 | 24,360 |
| Financial & Leasing | 27,640 | 27,230 | 26,255 | 32,635 | 32,780 | 31,160 | 29,930 | 29,865 | 28,770 |
| Professional & Managerial Services | 119,160 | 147,250 | 123,920 | 172,315 | 172,970 | 174,600 | 177,975 | 187,605 | 190,600 |
| Health & Educational Services | 112,595 | 134,290 | 109,835 | 132,975 | 145,250 | 156,010 | 167,190 | 183,665 | 197,755 |
| Arts, Recreation & Other Services | 104,115 | 106,120 | 90,635 | 101,500 | 102,390 | 103,825 | 106,790 | 111,510 | 113,730 |
| Government | 82,680 | 93,810 | 112,225 | 120,385 | 123,350 | 124,320 | 122,720 | 115,840 | 109,500 |
| Total Jobs | 704,895 | 805,040 | 705,865 | 834,520 | 858,995 | 877,545 | 901,380 | 934,000 | 953,190 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## Projected Age Distribution, Alameda

Source: ABAG / MTC Plan Bay Area data

## COUNTY OVERVIEW

Alameda County is one of the Bay Area's earlier developed counties, with most of its jurisdictions incorporated prior to World War II. It has a continuously urbanized corridor running parallel with the bay in the west, spanning a stretch of over 30 miles between Berkeley in the north and Fremont in the south where the county abuts Milpitas in Santa Clara County. Another axis of development is along the eastward 580 corridor / BART line, with its terminus in Dublin and Pleasanton forming important population and increasingly employment centers.

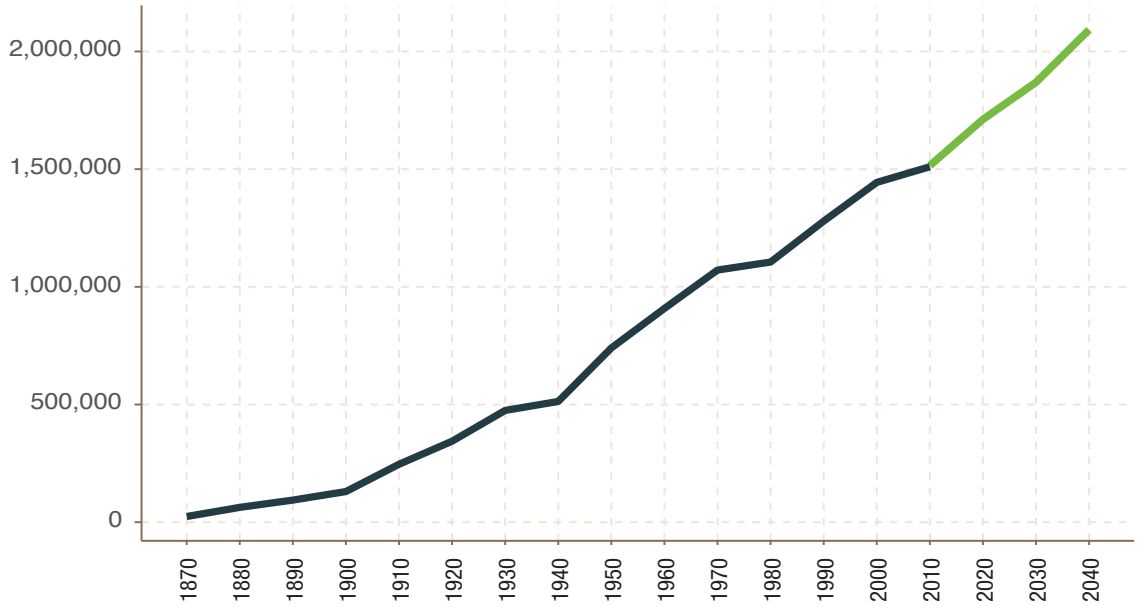
Alameda County has great access to transit service, with key operators including Bay Area Rapid Transit (BART) and AC Transit. BART recently expanded service to Warm Springs / South Fremont, and is working on the Silicon Valley BART Extension connecting the East Bay to San José slated for completion in 2019. Several Bus Rapid Transit (BRT) lines are in operation in the county, along San Pablo Avenue, and along East 14th Street/International Boulevard. The County is also served by the Amtrak Capitol Corridor for service to Sacramento, and the Altamont Commuter Express (ACE) train links the southern part of the county to San Joaquin County to the east and major employment centers in Santa Clara County.

## POPULATION

Alameda County is the second largest in the region by population, at 1.51 million by 2010. The population of Alameda County is projected

to grow by 38 percent, reaching a total of nearly 2.1 million people by 2040. The number of households is projected to increase by 35 percent to 734,000 in 2040. Oakland, the largest city in Alameda County, and the third largest city in the Bay Area, is expected to add almost 260,000 new residents and almost 88,000 new households in the next thirty years, accommodating almost half of the total population and household growth projected for the county. Population and household increases in Fremont, the second largest city in the county, and fourth largest city in the region, accounts for 10 percent of the total county growth. Emeryville, and Dublin will experience substantial changes in the future, with Emeryville more than tripling its population and households, and Dublin almost doubling its current population base.

### Historic and Projected Population, Alameda




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

## ECONOMY

Alameda County's economy has capitalized on its access to railroads and ports, developing transportation and manufacturing industries through the 20th century. In spite of restructuring of the county's economy, the Manufacturing, Wholesale and Transportation sector still makes up 15 percent of the county's jobs. In recent decades, this sector has generally shifted away from goods production towards administrative, research and development, and marketing functions. The University of California is the largest employer in the county, and education and research activities serve as important economic drivers. The largest share of the county's employment is Professional & Managerial Services, with 18 percent of jobs, while Health & Educational Services and the Information, Government and Construction sector each account for another with 16 percent of total jobs.

Important centers, apart from Oakland, include Fremont, Berkeley, Hayward and San Leandro in the west, and Pleasanton and Livermore in the east. Employment in Alameda County is projected to increase by over 247,000 jobs between 2010 and 2040, a 35 percent increase. It is anticipated that Oakland will assume 38 percent of the county's total job growth, highest among all cities in the county, followed by Berkeley and Fremont, each taking on 13 percent of the total increase in employment. Similar to its population and household growth, Dublin's employment is expected to increase by over 70 percent or over 13,000 new jobs. There are 43 PDAs in Alameda County, which include all of the BART stations, many of the downtowns, and transit nodes along the major bus corridors. With growth and new development poised to take advantage of the county's excellent connectivity via these transit accessible areas, Alameda County is projected to grow significantly, taking on some 23 percent of the region's total household and 19 percent job growth. More than eight of 10 households are projected to be in the county's PDAs, while for jobs, the figure is closer to six out of 10.

# Data Tables for Alameda County

## ALAMEDA POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 73,810 | 77,655 | 74,635 | 86,725 | 87,460 | 89,000 | 90,560 | 91,265 | 92,465 |
| Albany | 18,540 | 18,825 | 18,625 | 19,110 | 19,285 | 19,580 | 19,925 | 20,180 | 20,425 |
| Berkeley | 112,580 | 119,245 | 112,660 | 119,525 | 127,520 | 131,005 | 135,680 | 137,680 | 140,935 |
| Dublin | 46,035 | 56,165 | 46,680 | 49,980 | 51,070 | 54,780 | 71,870 | 78,140 | 83,595 |
| Emeryville | 10,080 | 10,900 | 10,105 | 11,780 | 12,260 | 13,845 | 16,050 | 25,005 | 34,130 |
| Fremont | 214,090 | 228,030 | 214,765 | 222,155 | 231,970 | 234,595 | 239,610 | 255,755 | 275,440 |
| Hayward | 144,185 | 156,620 | 145,675 | 150,960 | 154,280 | 156,420 | 160,295 | 167,995 | 178,270 |
| Livermore | 80,970 | 86,580 | 81,285 | 83,345 | 84,935 | 89,960 | 99,115 | 106,190 | 113,730 |
| Newark | 42,575 | 44,430 | 42,710 | 44,465 | 44,905 | 45,355 | 45,990 | 46,355 | 47,720 |
| Oakland | 390,725 | 417,995 | 392,105 | 442,725 | 480,270 | 516,855 | 554,325 | 588,710 | 650,625 |
| Piedmont | 10,665 | 11,175 | 10,665 | 10,650 | 10,765 | 10,885 | 11,040 | 11,090 | 11,170 |
| Pleasanton | 70,285 | 74,345 | 66,605 | 70,560 | 75,030 | 76,235 | 78,370 | 83,115 | 87,875 |
| San Leandro | 84,950 | 87,865 | 85,300 | 86,220 | 98,635 | 101,045 | 103,910 | 105,210 | 107,520 |
| Union City | 69,515 | 72,775 | 69,740 | 75,675 | 76,215 | 76,935 | 78,100 | 79,080 | 79,845 |
| Unincorporated | 141,265 | 148,715 | 143,675 | 151,910 | 156,865 | 159,995 | 163,800 | 164,855 | 168,620 |
| County | 1,510,270 | 1,611,320 | 1,515,230 | 1,625,780 | 1,711,460 | 1,776,495 | 1,868,635 | 1,960,630 | 2,092,370 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities

## ALAMEDA HOUSEHOLD POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 72,315 | 76,230 | 73,140 | 85,140 | 85,785 | 87,230 | 88,685 | 89,280 | 90,370 |
| Albany | 15,375 | 16,255 | 18,545 | 19,025 | 19,195 | 19,480 | 19,825 | 20,075 | 20,310 |
| Berkeley | 99,730 | 105,330 | 100,040 | 106,175 | 113,395 | 116,060 | 119,875 | 120,960 | 123,250 |
| Dublin | 40,260 | 52,105 | 40,315 | 43,160 | 43,890 | 47,310 | 64,005 | 69,885 | 74,795 |
| Emeryville | 10,005 | 10,825 | 10,040 | 11,705 | 12,180 | 13,765 | 15,960 | 24,915 | 34,030 |
| Fremont | 212,440 | 226,380 | 213,115 | 220,415 | 230,120 | 232,640 | 237,540 | 253,570 | 273,130 |
| Hayward | 141,460 | 153,440 | 143,020 | 148,150 | 151,305 | 153,275 | 156,965 | 164,465 | 174,530 |
| Livermore | 80,460 | 86,070 | 80,695 | 82,725 | 84,280 | 89,265 | 98,380 | 105,410 | 112,905 |
| Newark | 42,430 | 44,285 | 42,565 | 44,310 | 44,740 | 45,185 | 45,805 | 46,165 | 47,515 |
| Oakland | 382,585 | 410,190 | 383,780 | 433,905 | 470,950 | 507,020 | 543,910 | 577,710 | 638,980 |
| Piedmont | 10,665 | 11,170 | 10,660 | 10,645 | 10,760 | 10,880 | 11,035 | 11,090 | 11,170 |
| Pleasanton | 69,830 | 73,890 | 66,155 | 70,085 | 74,525 | 75,705 | 77,805 | 82,520 | 87,245 |
| San Leandro | 84,300 | 87,215 | 84,655 | 85,540 | 97,885 | 100,255 | 103,070 | 104,325 | 106,585 |
| Union City | 69,000 | 72,255 | 69,215 | 75,120 | 75,630 | 76,315 | 77,445 | 78,385 | 79,110 |
| Unincorporated | 138,895 | 146,355 | 141,290 | 149,395 | 154,235 | 157,205 | 160,855 | 161,755 | 165,345 |
| County | 1,469,750 | 1,572,000 | 1,477,230 | 1,585,490 | 1,668,875 | 1,731,595 | 1,821,170 | 1,910,510 | 2,039,275 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities

## ALAMEDA HOUSEHOLDS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 30,125 | 30,755 | 30,125 | 33,990 | 34,320 | 34,875 | 35,295 | 35,150 | 35,130 |
| Albany | 6,310 | 6,445 | 7,400 | 7,560 | 7,630 | 7,740 | 7,845 | 7,865 | 7,855 |
| Berkeley | 46,030 | 46,985 | 46,030 | 48,780 | 52,290 | 53,475 | 55,095 | 55,025 | 55,370 |
| Dublin | 14,915 | 18,645 | 14,915 | 15,860 | 16,150 | 17,345 | 23,250 | 25,065 | 26,475 |
| Emeryville | 5,695 | 5,955 | 5,695 | 6,820 | 7,080 | 7,965 | 9,175 | 14,060 | 18,885 |
| Fremont | 71,005 | 73,130 | 71,005 | 73,300 | 77,065 | 77,825 | 79,215 | 84,280 | 90,160 |
| Hayward | 45,365 | 47,560 | 45,365 | 47,110 | 48,130 | 48,745 | 49,660 | 51,575 | 54,335 |
| Livermore | 29,135 | 30,120 | 29,135 | 29,830 | 30,405 | 32,180 | 35,570 | 37,570 | 39,675 |
| Newark | 12,970 | 13,085 | 12,970 | 13,450 | 13,595 | 13,715 | 13,845 | 13,805 | 14,055 |
| Oakland | 153,790 | 159,365 | 153,790 | 174,405 | 186,145 | 198,855 | 211,790 | 223,170 | 241,465 |
| Piedmont | 3,800 | 3,850 | 3,800 | 3,780 | 3,820 | 3,865 | 3,900 | 3,875 | 3,850 |
| Pleasanton | 25,245 | 25,820 | 25,245 | 25,360 | 27,040 | 27,365 | 27,990 | 29,320 | 30,575 |
| San Leandro | 30,715 | 30,715 | 30,715 | 30,930 | 35,150 | 35,945 | 36,810 | 36,890 | 37,260 |
| Union City | 20,435 | 20,680 | 20,435 | 22,280 | 22,450 | 22,630 | 22,865 | 22,910 | 22,830 |
| Unincorporated | 48,515 | 49,410 | 48,515 | 52,020 | 53,700 | 54,870 | 55,980 | 55,810 | 56,285 |
| County | 544,045 | 562,525 | 545,140 | 585,475 | 614,965 | 637,395 | 668,285 | 696,370 | 734,210 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## ALAMEDA PERSONS PER HOUSEHOLD

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 2.40 | 2.48 | 2.43 | 2.50 | 2.50 | 2.50 | 2.51 | 2.54 | 2.57 |
| Albany | 2.44 | 2.52 | 2.51 | 2.52 | 2.52 | 2.52 | 2.53 | 2.55 | 2.59 |
| Berkeley | 2.17 | 2.24 | 2.17 | 2.18 | 2.17 | 2.17 | 2.18 | 2.20 | 2.23 |
| Dublin | 2.70 | 2.79 | 2.70 | 2.72 | 2.72 | 2.73 | 2.75 | 2.79 | 2.83 |
| Emeryville | 1.76 | 1.82 | 1.76 | 1.72 | 1.72 | 1.73 | 1.74 | 1.77 | 1.80 |
| Fremont | 2.99 | 3.10 | 3.00 | 3.01 | 2.99 | 2.99 | 3.00 | 3.01 | 3.03 |
| Hayward | 3.12 | 3.23 | 3.15 | 3.14 | 3.14 | 3.14 | 3.16 | 3.19 | 3.21 |
| Livermore | 2.76 | 2.86 | 2.77 | 2.77 | 2.77 | 2.77 | 2.77 | 2.81 | 2.85 |
| Newark | 3.27 | 3.38 | 3.28 | 3.29 | 3.29 | 3.29 | 3.31 | 3.34 | 3.38 |
| Oakland | 2.49 | 2.57 | 2.50 | 2.49 | 2.53 | 2.55 | 2.57 | 2.59 | 2.65 |
| Piedmont | 2.81 | 2.90 | 2.81 | 2.82 | 2.82 | 2.82 | 2.83 | 2.86 | 2.90 |
| Pleasanton | 2.77 | 2.86 | 2.62 | 2.76 | 2.76 | 2.77 | 2.78 | 2.81 | 2.85 |
| San Leandro | 2.74 | 2.84 | 2.76 | 2.77 | 2.78 | 2.79 | 2.80 | 2.83 | 2.86 |
| Union City | 3.38 | 3.49 | 3.39 | 3.37 | 3.37 | 3.37 | 3.39 | 3.42 | 3.47 |
| Unincorporated | 2.86 | 2.96 | 2.91 | 2.87 | 2.87 | 2.87 | 2.87 | 2.90 | 2.94 |
| County | 2.70 | 2.79 | 2.71 | 2.71 | 2.71 | 2.72 | 2.73 | 2.74 | 2.78 |

Source: Calculated from Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## ALAMEDA EMPLOYED RESIDENTS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 38,355 | 41,060 | 38,570 | 52,720 | 52,455 | 52,600 | 52,730 | 52,040 | 51,390 |
| Albany | 8,920 | 9,740 | 9,505 | 10,950 | 10,935 | 10,960 | 11,010 | 10,885 | 10,765 |
| Berkeley | 54,650 | 62,125 | 58,620 | 70,360 | 74,620 | 75,510 | 76,705 | 76,250 | 75,985 |
| Dublin | 22,810 | 29,015 | 15,325 | 18,435 | 18,490 | 20,040 | 27,925 | 30,610 | 32,180 |
| Emeryville | 6,395 | 7,490 | 3,235 | 4,290 | 4,430 | 4,930 | 5,635 | 8,605 | 11,485 |
| Fremont | 103,490 | 116,130 | 108,865 | 127,440 | 132,825 | 132,950 | 134,345 | 140,880 | 148,155 |
| Hayward | 67,060 | 79,585 | 66,550 | 76,875 | 77,400 | 77,380 | 78,090 | 80,435 | 83,835 |
| Livermore | 41,745 | 47,095 | 39,605 | 45,335 | 45,420 | 47,505 | 51,790 | 54,680 | 57,315 |
| Newark | 21,370 | 23,185 | 20,330 | 23,810 | 23,745 | 23,755 | 23,720 | 23,485 | 23,670 |
| Oakland | 184,145 | 213,760 | 179,210 | 229,700 | 243,160 | 254,610 | 267,165 | 277,535 | 296,185 |
| Piedmont | 5,015 | 5,210 | 5,560 | 6,730 | 6,865 | 6,975 | 7,070 | 7,020 | 6,985 |
| Pleasanton | 34,270 | 39,220 | 36,345 | 44,355 | 46,990 | 47,100 | 47,770 | 49,840 | 51,545 |
| San Leandro | 41,030 | 45,290 | 39,115 | 44,155 | 49,215 | 49,565 | 49,885 | 49,395 | 49,170 |
| Union City | 33,110 | 36,945 | 33,200 | 40,645 | 40,485 | 40,420 | 40,545 | 40,115 | 39,660 |
| Unincorporated | 65,430 | 71,945 | 69,765 | 83,170 | 84,695 | 84,930 | 85,355 | 83,980 | 83,720 |
| County | 727,800 | 827,795 | 723,810 | 878,975 | 911,725 | 929,230 | 959,745 | 985,760 | 1,022,040 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## ALAMEDA TOTAL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 26,390 | 30,730 | 29,265 | 32,400 | 38,905 | 40,955 | 41,730 | 42,235 | 42,420 |
| Albany | 4,450 | 5,300 | 4,415 | 4,880 | 4,925 | 5,005 | 5,080 | 5,175 | 5,190 |
| Berkeley | 60,015 | 73,720 | 90,350 | 114,665 | 116,435 | 117,700 | 118,885 | 121,315 | 121,670 |
| Dublin | 16,155 | 20,500 | 18,085 | 20,935 | 21,330 | 21,815 | 24,205 | 30,325 | 31,115 |
| Emeryville | 20,650 | 23,860 | 15,855 | 19,540 | 19,765 | 19,715 | 19,920 | 20,130 | 20,010 |
| Fremont | 91,415 | 114,245 | 86,150 | 95,205 | 103,130 | 106,945 | 110,300 | 111,770 | 118,460 |
| Hayward | 69,190 | 73,235 | 60,870 | 68,105 | 69,910 | 71,820 | 74,555 | 77,170 | 77,805 |
| Livermore | 44,125 | 49,210 | 42,705 | 43,180 | 43,025 | 43,335 | 43,950 | 45,105 | 45,870 |
| Newark | 16,505 | 18,265 | 17,340 | 18,180 | 19,055 | 19,920 | 21,130 | 22,565 | 22,875 |
| Oakland | 212,335 | 217,155 | 179,065 | 244,050 | 247,310 | 252,910 | 259,175 | 267,240 | 272,760 |
| Piedmont | 2,360 | 2,300 | 1,815 | 1,975 | 1,945 | 1,940 | 1,950 | 1,955 | 1,930 |
| Pleasanton | 51,720 | 66,125 | 60,095 | 65,140 | 65,185 | 65,445 | 66,940 | 72,480 | 75,440 |
| San Leandro | 39,335 | 48,470 | 49,715 | 53,960 | 54,695 | 55,885 | 57,830 | 59,200 | 59,610 |
| Union City | 21,900 | 31,725 | 20,990 | 22,905 | 24,065 | 24,980 | 26,120 | 27,190 | 28,105 |
| Unincorporated | 28,345 | 30,200 | 28,825 | 29,115 | 29,010 | 28,845 | 29,315 | 29,875 | 29,680 |
| County | 704,895 | 805,040 | 705,540 | 834,230 | 858,685 | 877,220 | 901,080 | 933,725 | 952,940 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## ALAMEDA AGRICULTURE AND NATURAL RESOURCES JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 5 | 0 | 5 | 15 | 20 | 20 | 20 | 20 | 20 |
| Albany | 5 | 0 | 5 | 10 | 10 | 10 | 10 | 10 | 10 |
| Berkeley | 35 | 35 | 30 | 35 | 35 | 35 | 35 | 35 | 35 |
| Dublin | 10 | 15 | 40 | 80 | 75 | 75 | 80 | 80 | 80 |
| Emeryville | 20 | 0 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Fremont | 150 | 35 | 80 | 140 | 150 | 155 | 160 | 160 | 165 |
| Hayward | 25 | 35 | 30 | 45 | 45 | 45 | 45 | 45 | 45 |
| Livermore | 10 | 160 | 155 | 230 | 230 | 225 | 230 | 240 | 240 |
| Newark | 40 | 25 | 20 | 25 | 25 | 25 | 25 | 25 | 25 |
| Oakland | 445 | 35 | 280 | 305 | 300 | 285 | 280 | 270 | 250 |
| Piedmont | 25 | 25 | 10 | 10 | 10 | 10 | 10 | 5 | 5 |
| Pleasanton | 20 | 110 | 120 | 180 | 180 | 180 | 185 | 185 | 190 |
| San Leandro | 0 | 0 | 20 | 35 | 30 | 30 | 35 | 35 | 35 |
| Union City | 0 | 5 | 25 | 35 | 35 | 35 | 40 | 40 | 40 |
| Unincorporated | 125 | 105 | 75 | 95 | 95 | 95 | 95 | 95 | 95 |
| County | 1,025 | 710 | 895 | 1,240 | 1,245 | 1,235 | 1,245 | 1,250 | 1,240 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## ALAMEDA MANUFACTURING, WHOLESALE AND TRANSPORTATION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 4,230 | 4,230 | 3,405 | 3,420 | 3,460 | 3,475 | 3,445 | 3,355 | 3,315 |
| Albany | 115 | 135 | 180 | 240 | 250 | 260 | 275 | 270 | 275 |
| Berkeley | 5,070 | 6,505 | 4,830 | 5,135 | 5,085 | 4,975 | 4,890 | 4,740 | 4,640 |
| Dublin | 2,185 | 1,765 | 2,000 | 2,020 | 2,020 | 2,020 | 2,075 | 2,085 | 2,115 |
| Emeryville | 2,390 | 2,415 | 2,455 | 2,415 | 2,305 | 2,180 | 2,075 | 1,845 | 1,675 |
| Fremont | 27,695 | 37,470 | 23,500 | 25,310 | 30,200 | 32,470 | 33,845 | 34,675 | 35,250 |
| Hayward | 20,980 | 23,465 | 16,080 | 16,440 | 16,850 | 17,300 | 18,045 | 18,870 | 19,005 |
| Livermore | 8,285 | 10,060 | 6,255 | 6,250 | 6,470 | 6,660 | 7,040 | 7,395 | 7,510 |
| Newark | 4,130 | 5,025 | 4,135 | 4,045 | 4,290 | 4,510 | 4,865 | 5,380 | 5,590 |
| Oakland | 31,055 | 30,235 | 20,390 | 22,755 | 22,440 | 22,195 | 21,800 | 21,280 | 20,790 |
| Piedmont | 20 | 5 | 45 | 45 | 45 | 45 | 40 | 40 | 35 |
| Pleasanton | 5,880 | 7,120 | 7,425 | 6,975 | 6,685 | 6,525 | 6,430 | 6,155 | 6,100 |
| San Leandro | 11,445 | 12,230 | 19,990 | 18,085 | 17,360 | 16,875 | 16,665 | 16,335 | 15,985 |
| Union City | 9,015 | 11,155 | 7,820 | 7,725 | 8,090 | 8,280 | 8,555 | 8,830 | 8,985 |
| Unincorporated | 2,085 | 1,925 | 2,760 | 2,675 | 2,680 | 2,685 | 2,745 | 2,885 | 2,915 |
| County | 135,820 | 154,150 | 121,280 | 123,520 | 128,240 | 130,460 | 132,790 | 134,145 | 134,195 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## ALAMEDA RETAIL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 2,470 | 2,745 | 1,810 | 2,210 | 2,140 | 2,130 | 2,120 | 2,090 | 2,050 |
| Albany | 875 | 865 | 660 | 710 | 705 | 710 | 705 | 690 | 695 |
| Berkeley | 5,505 | 6,970 | 5,185 | 5,710 | 5,965 | 6,060 | 6,150 | 6,075 | 6,000 |
| Dublin | 3,645 | 5,205 | 3,020 | 3,465 | 3,405 | 3,550 | 4,580 | 4,885 | 5,020 |
| Emeryville | 2,965 | 3,270 | 1,660 | 2,155 | 2,190 | 2,445 | 2,765 | 3,880 | 5,030 |
| Fremont | 7,660 | 8,020 | 7,120 | 7,920 | 8,225 | 8,040 | 7,965 | 8,195 | 8,555 |
| Hayward | 7,410 | 8,640 | 5,845 | 6,450 | 6,425 | 6,420 | 6,420 | 6,540 | 6,700 |
| Livermore | 3,620 | 5,630 | 4,330 | 4,965 | 4,845 | 4,920 | 5,265 | 5,445 | 5,595 |
| Newark | 3,190 | 2,585 | 3,340 | 3,630 | 3,640 | 3,590 | 3,540 | 3,485 | 3,465 |
| Oakland | 13,630 | 13,890 | 10,085 | 12,185 | 12,545 | 13,175 | 13,725 | 14,115 | 14,770 |
| Piedmont | 190 | 150 | 30 | 100 | 95 | 95 | 95 | 95 | 90 |
| Pleasanton | 6,795 | 7,930 | 11,395 | 11,690 | 12,380 | 12,515 | 12,680 | 13,010 | 13,330 |
| San Leandro | 6,200 | 6,950 | 6,100 | 6,450 | 7,135 | 7,180 | 7,245 | 7,160 | 7,130 |
| Union City | 2,675 | 3,600 | 2,420 | 2,820 | 2,755 | 2,720 | 2,700 | 2,660 | 2,620 |
| Unincorporated | 2,795 | 2,760 | 1,905 | 2,115 | 2,110 | 2,130 | 2,120 | 2,080 | 2,065 |
| County | 68,730 | 78,500 | 64,900 | 72,570 | 74,560 | 75,685 | 78,075 | 80,405 | 83,115 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## ALAMEDA FINANCIAL AND PROFESSIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 7,390 | 8,435 | 5,310 | 6,820 | 9,805 | 10,750 | 11,220 | 11,695 | 11,775 |
| Albany | 815 | 575 | 625 | 820 | 810 | 805 | 815 | 840 | 840 |
| Berkeley | 8,025 | 10,055 | 25,150 | 37,055 | 37,305 | 37,650 | 38,035 | 39,305 | 39,260 |
| Dublin | 3,175 | 4,710 | 4,020 | 4,940 | 4,935 | 4,865 | 4,935 | 7,145 | 7,090 |
| Emeryville | 7,305 | 9,095 | 5,095 | 5,915 | 5,730 | 5,415 | 5,245 | 4,960 | 4,420 |
| Fremont | 21,895 | 28,555 | 20,260 | 22,525 | 22,290 | 21,890 | 21,795 | 21,225 | 24,110 |
| Hayward | 9,715 | 10,000 | 9,215 | 11,795 | 11,695 | 11,735 | 11,965 | 12,345 | 12,225 |
| Livermore | 13,775 | 13,965 | 12,600 | 12,305 | 11,675 | 11,150 | 10,595 | 10,405 | 10,045 |
| Newark | 3,205 | 4,175 | 3,630 | 3,425 | 3,240 | 3,160 | 3,130 | 3,070 | 2,890 |
| Oakland | 41,235 | 46,230 | 32,150 | 61,475 | 61,415 | 62,095 | 63,680 | 66,955 | 66,790 |
| Piedmont | 250 | 230 | 450 | 540 | 525 | 525 | 535 | 545 | 545 |
| Pleasanton | 20,885 | 26,090 | 17,015 | 20,415 | 19,865 | 19,480 | 19,625 | 22,420 | 23,170 |
| San Leandro | 6,110 | 6,925 | 5,815 | 7,465 | 7,290 | 7,300 | 7,500 | 7,745 | 7,590 |
| Union City | 1,795 | 3,685 | 2,625 | 3,005 | 3,005 | 3,015 | 3,090 | 3,155 | 3,210 |
| Unincorporated | 3,060 | 3,370 | 6,115 | 6,270 | 5,985 | 5,725 | 5,540 | 5,435 | 5,185 |
| County | 146,800 | 174,485 | 150,065 | 204,770 | 205,570 | 205,565 | 207,700 | 217,245 | 219,145 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## ALAMEDA HEALTH, EDUCATIONAL AND RECREATIONAL SERVICE JOBS

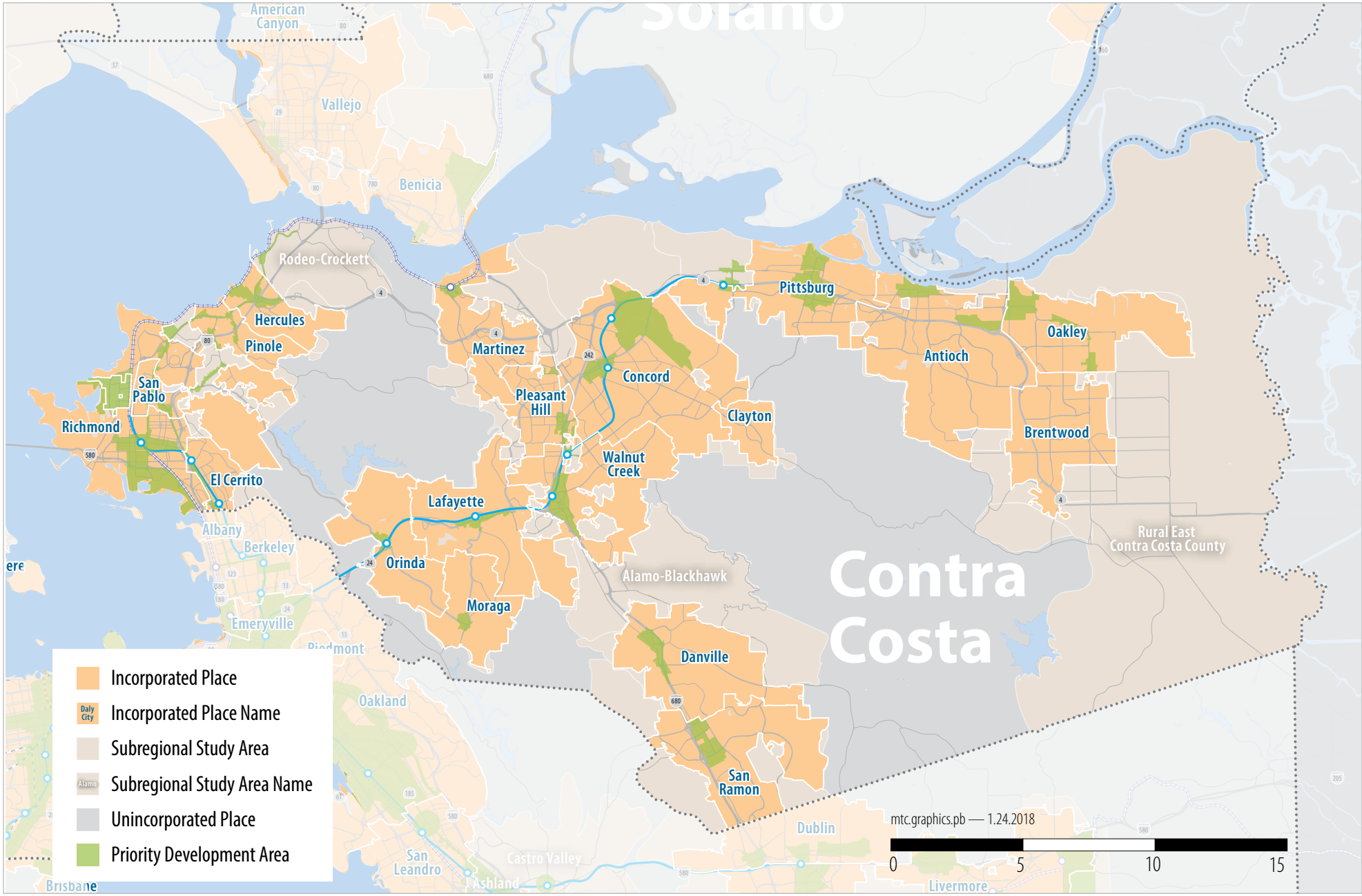
| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 9,050 | 10,755 | 7,820 | 8,930 | 12,260 | 13,300 | 13,825 | 14,225 | 14,645 |
| Albany | 2,020 | 2,855 | 1,670 | 1,720 | 1,775 | 1,825 | 1,865 | 1,975 | 2,015 |
| Berkeley | 21,190 | 25,565 | 39,255 | 46,515 | 47,695 | 48,655 | 49,465 | 51,210 | 52,160 |
| Dublin | 4,575 | 5,155 | 3,750 | 4,650 | 5,080 | 5,425 | 6,045 | 9,685 | 10,250 |
| Emeryville | 4,330 | 4,525 | 4,200 | 5,160 | 5,455 | 5,565 | 5,805 | 5,765 | 5,650 |
| Fremont | 21,485 | 24,915 | 20,675 | 21,810 | 23,485 | 24,685 | 26,280 | 27,405 | 30,355 |
| Hayward | 17,250 | 15,075 | 14,415 | 16,185 | 17,190 | 18,185 | 19,535 | 21,135 | 22,105 |
| Livermore | 8,295 | 9,000 | 8,875 | 8,870 | 9,235 | 9,655 | 10,120 | 10,970 | 11,950 |
| Newark | 3,610 | 4,305 | 3,735 | 3,795 | 4,080 | 4,345 | 4,720 | 5,320 | 5,455 |
| Oakland | 86,455 | 86,070 | 59,785 | 78,940 | 82,245 | 87,325 | 92,500 | 98,495 | 103,810 |
| Piedmont | 1,375 | 1,270 | 755 | 740 | 725 | 725 | 760 | 785 | 800 |
| Pleasanton | 10,600 | 16,475 | 9,970 | 11,155 | 11,630 | 12,350 | 13,390 | 15,845 | 18,210 |
| San Leandro | 9,790 | 14,490 | 9,135 | 10,320 | 10,770 | 11,535 | 12,730 | 14,320 | 15,315 |
| Union City | 5,430 | 9,205 | 5,350 | 5,320 | 5,565 | 5,785 | 6,110 | 6,670 | 7,270 |
| Unincorporated | 12,950 | 12,075 | 11,075 | 10,365 | 10,460 | 10,475 | 10,830 | 11,365 | 11,500 |
| County | 216,710 | 240,410 | 200,475 | 234,480 | 247,645 | 259,835 | 273,980 | 295,175 | 311,485 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## ALAMEDA INFORMATION, GOVERNMENT AND CONSTRUCTION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Alameda | 3,250 | 4,560 | 10,910 | 11,000 | 11,215 | 11,275 | 11,100 | 10,850 | 10,610 |
| Albany | 630 | 870 | 1,280 | 1,375 | 1,370 | 1,400 | 1,415 | 1,390 | 1,355 |
| Berkeley | 20,185 | 24,590 | 15,900 | 20,210 | 20,350 | 20,325 | 20,310 | 19,950 | 19,575 |
| Dublin | 2,565 | 3,645 | 5,255 | 5,780 | 5,810 | 5,880 | 6,490 | 6,440 | 6,560 |
| Emeryville | 3,645 | 4,555 | 2,440 | 3,895 | 4,080 | 4,110 | 4,020 | 3,675 | 3,230 |
| Fremont | 12,530 | 15,260 | 14,515 | 17,500 | 18,780 | 19,705 | 20,255 | 20,110 | 20,025 |
| Hayward | 13,810 | 16,020 | 15,285 | 17,195 | 17,705 | 18,135 | 18,545 | 18,230 | 17,725 |
| Livermore | 10,130 | 10,400 | 10,495 | 10,560 | 10,570 | 10,725 | 10,705 | 10,655 | 10,530 |
| Newark | 2,330 | 2,150 | 2,480 | 3,265 | 3,775 | 4,295 | 4,850 | 5,285 | 5,450 |
| Oakland | 39,510 | 40,700 | 56,380 | 68,390 | 68,360 | 67,830 | 67,190 | 66,125 | 66,345 |
| Piedmont | 495 | 620 | 530 | 545 | 540 | 535 | 505 | 480 | 455 |
| Pleasanton | 7,540 | 8,400 | 14,165 | 14,730 | 14,450 | 14,390 | 14,635 | 14,860 | 14,445 |
| San Leandro | 5,795 | 7,875 | 8,650 | 11,610 | 12,110 | 12,960 | 13,660 | 13,605 | 13,560 |
| Union City | 2,980 | 4,080 | 2,750 | 4,000 | 4,620 | 5,145 | 5,630 | 5,835 | 5,980 |
| Unincorporated | 7,325 | 9,960 | 6,895 | 7,595 | 7,685 | 7,735 | 7,980 | 8,015 | 7,920 |
| County | 135,805 | 156,785 | 167,930 | 197,645 | 201,420 | 204,445 | 207,285 | 205,505 | 203,760 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.


American Canyon
Vallejo
Benicia
Rodeo-Crockett
Hercules
Pinole
San Pablo
Richmond
El Cerrito
Albany
Berkeley
Emeryville
Oakland
Martinez
Pleasant Hill
Concord
Pittsburg
Antioch
Oakley
Brentwood
Clayton
Walnut Creek
Lafayette
Orinda
Moraga
Alamo-Blackhawk
Danville
San Ramon
Dublin
Livermore
Castro Valley
San Leandro
Ashland
Rural East Contra Costa County
Contra Costa
Incorporated Place
Daly City
Incorporated Place Name
Subregional Study Area
Alamo
Subregional Study Area Name
Unincorporated Place
Priority Development Area
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# Contra Costa County

## CONTRA COSTA DATA SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 1,049,025 | 1,111,900 | 1,051,830 | 1,093,170 | 1,128,660 | 1,198,715 | 1,257,790 | 1,329,330 | 1,387,295 |
| Household Population | 1,038,710 | 1,100,930 | 1,042,275 | 1,083,080 | 1,117,995 | 1,187,440 | 1,245,855 | 1,316,715 | 1,373,965 |
| Households | 375,365 | 387,920 | 375,365 | 386,755 | 399,615 | 422,435 | 440,765 | 461,065 | 475,390 |
| Persons per Household | 2.77 | 2.84 | 2.78 | 2.80 | 2.80 | 2.81 | 2.83 | 2.86 | 2.89 |
| Employed Residents | 487,735 | 536,210 | 497,445 | 579,075 | 589,810 | 617,185 | 633,830 | 655,135 | 665,875 |
| Agriculture & Natural Resources | 1,660 | 1,550 | 1,195 | 1,450 | 1,450 | 1,455 | 1,450 | 1,430 | 1,440 |
| Construction | 20,835 | 26,185 | 19,305 | 25,130 | 26,080 | 27,430 | 30,750 | 35,840 | 39,010 |
| Manufacturing & Wholesale | 28,265 | 27,780 | 25,670 | 25,795 | 25,745 | 25,845 | 26,310 | 26,590 | 26,045 |
| Retail | 46,405 | 48,415 | 42,410 | 45,825 | 45,985 | 47,140 | 48,140 | 49,380 | 50,180 |
| Transportation & Utilities | 7,115 | 8,010 | 10,885 | 11,625 | 11,940 | 12,040 | 12,680 | 13,500 | 14,095 |
| Information | 11,220 | 9,895 | 18,315 | 23,555 | 23,455 | 22,245 | 22,410 | 24,275 | 22,785 |
| Financial & Leasing | 31,155 | 31,350 | 24,740 | 27,710 | 27,470 | 26,295 | 26,560 | 26,060 | 26,320 |
| Professional & Managerial Services | 51,535 | 59,305 | 60,350 | 76,340 | 76,460 | 78,965 | 85,930 | 90,370 | 97,145 |
| Health & Educational Services | 59,835 | 75,795 | 59,060 | 65,815 | 71,420 | 76,100 | 88,985 | 98,230 | 104,680 |
| Arts, Recreation & Other Services | 56,585 | 60,690 | 52,610 | 54,685 | 54,645 | 54,805 | 61,055 | 64,155 | 64,150 |
| Government | 46,310 | 47,465 | 45,545 | 48,135 | 49,580 | 51,480 | 53,955 | 53,975 | 52,320 |
| Total Jobs | 360,915 | 396,435 | 360,080 | 406,060 | 414,225 | 423,800 | 458,230 | 483,810 | 498,165 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## Projected Age Distribution, Contra Costa

Source: ABAG / MTC Plan Bay Area data

## COUNTY OVERVIEW

Contra Costa County is the third most populous county in the Bay Area, following Alameda and Santa Clara. The western side of the county was the earliest site of substantial urbanization, which was reinforced as manufacturing and refining industries grew in response to the Second World War. Cities in central county often began as rail depots serving nearby farmland, later emerged as bedroom communities during the postwar era, and began expanding as job centers in the 1980s as many back-office functions jobs left San Francisco. East county, historically relatively undeveloped, has taken on much of the county's most recent population growth.

In addition to the highway network, the county is served by a variety of transit services, including BART, Capitol Corridor, and AC Transit, WestCAT and Central Contra Costa Transit. The soon-to-open eBart line will serve passengers from the eastern portion of the county to connect with job centers in San Francisco and other areas connected by transit routes along both sides of the Bay.

## POPULATION

In 2010, Contra Costa County had over one million residents. Concord is the largest city with a population of over 122,000 people, followed by Richmond and Antioch, both with more than 100,000 residents as well.

By 2040, the population of Contra Costa County is estimated to be 32 percent above 2010, adding 336,000 new residents and reaching a

total population of about 1.4 million people. The number of households is projected to increase by 27 percent between 2010 and 2040, or a little over 100,000 households. Cities in the eastern portion of the county: Antioch, Brentwood, Pittsburg and Oakley are projected to take on a third of the county's population and household growth. Concord is projected to add 20,100 households, the highest count in the county, closely followed with Richmond, projected to add 18,800 households. The top three jurisdictions (including unincorporated Contra Costa County in third place) account for almost half the projected growth in population.

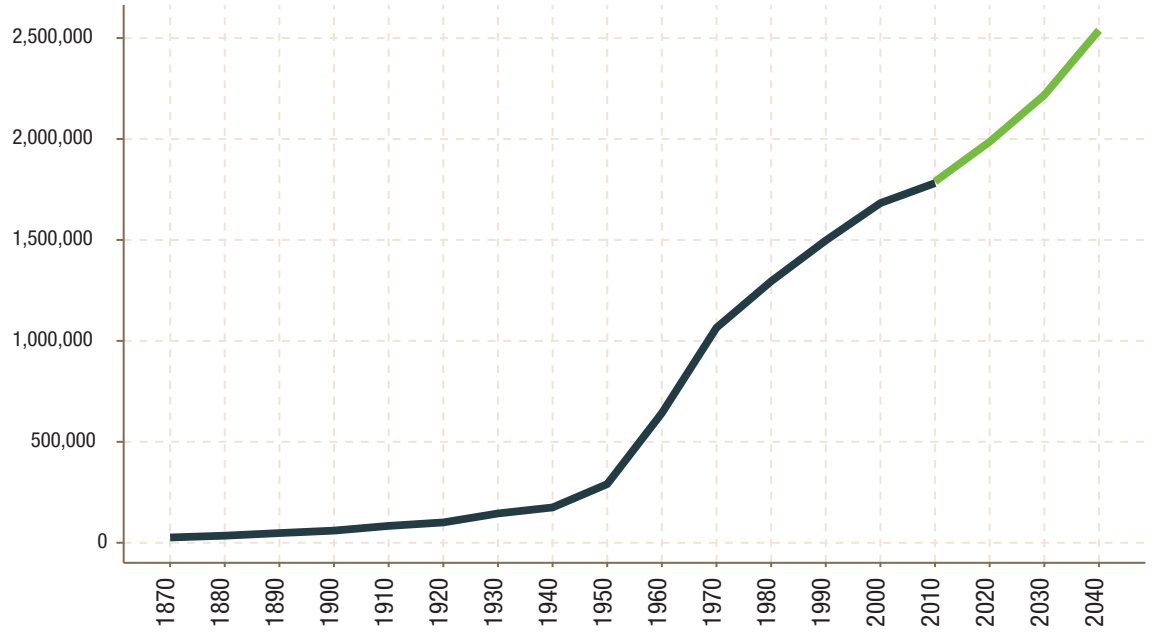
## ECONOMY

Early economic development in the county was focused on manufacturing, processing and refining industries which had spread out from San Francisco. These businesses located along the county's shoreline. Large industrial plants that refine petroleum, manufacture chemicals, and process raw materials are still a significant part of the county's economic picture, and still dominate its shoreline. Today, the Northern Waterfront Economic Development Initiative aims to leverage existing competitive advantages of the industries to revitalize the industrial areas along the northern waterfront.

In 2010, Contra Costa County had over 360,000 jobs. The Government sector had the highest share of jobs in Contra Costa County (16 percent), followed by Health and Educational Services (15 percent). By 2040, the number of jobs in the county is projected to increase by 137,880, or 38 percent. Concord is expected to assume 30 percent of the job growth in the county as the 2,300 acre Navy Weapon Station property is transferred to the city of Concord and redeveloped. San Ramon and Richmond are also taking on much of the county's job growth, accommodating 17 percent and 23 percent of the total job growth respectively.

Overall, the county will accommodate 12 percent of the region's total household growth and 11 percent of total job growth. New jobs and housing are expected to concentrated in the county's 38 PDAs, clustering along the county's major transit thoroughfares, including San Pablo Avenue in the western part of the county, and around the BART/eBART stations. All said, about two-thirds of new jobs and households are projected to go into PDAs.

### Historic and Projected Population, Contra Costa




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

# Data Tables for Contra Costa County

## CONTRA COSTA POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 102,370 | 111,265 | 101,695 | 100,395 | 103,595 | 106,480 | 112,960 | 123,755 | 130,725 |
| Brentwood | 51,480 | 57,080 | 52,020 | 50,560 | 52,745 | 54,665 | 60,320 | 79,700 | 84,460 |
| Clayton | 10,895 | 11,230 | 10,665 | 10,420 | 10,630 | 10,880 | 11,070 | 11,140 | 11,255 |
| Concord | 122,065 | 127,840 | 122,155 | 128,740 | 134,605 | 173,265 | 177,740 | 180,555 | 185,850 |
| Danville | 42,040 | 42,950 | 42,470 | 44,480 | 44,625 | 45,150 | 46,450 | 46,785 | 47,350 |
| El Cerrito | 23,550 | 24,250 | 23,550 | 24,305 | 26,845 | 27,375 | 28,090 | 28,550 | 29,075 |
| Hercules | 24,060 | 24,710 | 23,680 | 24,665 | 25,135 | 25,530 | 25,885 | 26,155 | 28,700 |
| Lafayette | 23,895 | 24,925 | 23,995 | 24,615 | 24,865 | 25,110 | 25,635 | 26,290 | 26,815 |
| Martinez | 35,825 | 37,165 | 35,995 | 35,930 | 36,660 | 37,605 | 38,480 | 39,055 | 40,035 |
| Moraga | 16,015 | 16,490 | 16,035 | 16,305 | 16,560 | 16,810 | 17,130 | 17,680 | 18,080 |
| Oakley | 35,430 | 39,505 | 35,280 | 34,325 | 35,360 | 36,755 | 48,450 | 49,505 | 54,435 |
| Orinda | 17,645 | 18,645 | 17,300 | 17,865 | 17,960 | 18,085 | 18,260 | 18,485 | 18,745 |
| Pinole | 18,390 | 18,795 | 18,940 | 19,180 | 19,615 | 20,050 | 20,830 | 21,030 | 21,390 |
| Pittsburg | 63,265 | 67,455 | 63,415 | 70,400 | 73,055 | 74,520 | 75,600 | 87,040 | 91,615 |
| Pleasant Hill | 33,150 | 34,085 | 32,990 | 33,055 | 33,590 | 34,225 | 35,065 | 35,325 | 35,925 |
| Richmond | 103,700 | 109,240 | 103,050 | 119,440 | 126,385 | 131,380 | 144,950 | 154,325 | 164,220 |
| San Pablo | 29,140 | 30,380 | 29,730 | 30,430 | 31,555 | 32,330 | 32,845 | 33,450 | 34,090 |
| San Ramon | 72,150 | 77,990 | 71,295 | 74,900 | 76,485 | 78,430 | 79,520 | 81,955 | 84,165 |
| Walnut Creek | 64,175 | 68,345 | 64,920 | 67,130 | 69,010 | 71,170 | 73,915 | 79,080 | 81,265 |
| Unincorporated | 159,785 | 169,560 | 162,645 | 166,030 | 169,375 | 178,900 | 184,585 | 189,455 | 199,105 |
| County | 1,049,025 | 1,111,900 | 1,051,830 | 1,093,170 | 1,128,660 | 1,198,715 | 1,257,790 | 1,329,330 | 1,387,295 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## CONTRA COSTA HOUSEHOLD POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 101,710 | 110,600 | 101,070 | 99,730 | 102,895 | 105,740 | 112,175 | 122,930 | 129,850 |
| Brentwood | 51,335 | 56,935 | 51,810 | 50,335 | 52,510 | 54,415 | 60,055 | 79,400 | 84,135 |
| Clayton | 10,885 | 11,220 | 10,655 | 10,410 | 10,620 | 10,870 | 11,060 | 11,130 | 11,245 |
| Concord | 121,020 | 126,465 | 121,180 | 127,710 | 133,515 | 172,110 | 176,520 | 179,265 | 184,485 |
| Danville | 41,795 | 42,705 | 42,360 | 44,365 | 44,500 | 45,020 | 46,310 | 46,645 | 47,200 |
| El Cerrito | 23,455 | 24,155 | 23,460 | 24,210 | 26,740 | 27,265 | 27,975 | 28,425 | 28,950 |
| Hercules | 24,005 | 24,655 | 23,625 | 24,605 | 25,075 | 25,465 | 25,820 | 26,080 | 28,620 |
| Lafayette | 23,795 | 24,825 | 23,850 | 24,465 | 24,705 | 24,940 | 25,460 | 26,105 | 26,620 |
| Martinez | 34,530 | 35,770 | 34,695 | 34,570 | 35,235 | 36,095 | 36,890 | 37,370 | 38,265 |
| Moraga | 14,295 | 14,765 | 14,425 | 14,600 | 14,755 | 14,900 | 15,110 | 15,540 | 15,815 |
| Oakley | 35,330 | 39,400 | 35,175 | 34,215 | 35,240 | 36,630 | 48,320 | 49,365 | 54,285 |
| Orinda | 17,600 | 18,605 | 17,225 | 17,785 | 17,875 | 17,995 | 18,165 | 18,390 | 18,640 |
| Pinole | 18,320 | 18,730 | 18,870 | 19,105 | 19,535 | 19,965 | 20,740 | 20,935 | 21,285 |
| Pittsburg | 62,975 | 67,165 | 63,125 | 70,095 | 72,730 | 74,175 | 75,240 | 86,660 | 91,210 |
| Pleasant Hill | 32,690 | 33,620 | 32,580 | 32,620 | 33,135 | 33,740 | 34,550 | 34,780 | 35,350 |
| Richmond | 102,120 | 107,445 | 102,300 | 118,650 | 125,550 | 130,505 | 144,030 | 153,360 | 163,190 |
| San Pablo | 28,700 | 29,940 | 29,285 | 29,960 | 31,055 | 31,800 | 32,285 | 32,860 | 33,465 |
| San Ramon | 72,075 | 77,915 | 71,050 | 74,640 | 76,210 | 78,140 | 79,215 | 81,625 | 83,815 |
| Walnut Creek | 63,170 | 67,345 | 64,130 | 66,300 | 68,130 | 70,245 | 72,930 | 78,040 | 80,165 |
| Unincorporated | 158,915 | 168,675 | 161,405 | 164,715 | 167,980 | 177,415 | 183,005 | 187,810 | 197,375 |
| County | 1,038,710 | 1,100,930 | 1,042,275 | 1,083,080 | 1,117,995 | 1,187,440 | 1,245,855 | 1,316,715 | 1,373,965 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## CONTRA COSTA HOUSEHOLDS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 32,250 | 34,235 | 32,250 | 31,725 | 32,785 | 33,630 | 35,440 | 38,405 | 40,280 |
| Brentwood | 16,490 | 17,855 | 16,490 | 15,985 | 16,765 | 17,355 | 19,070 | 25,030 | 26,075 |
| Clayton | 4,005 | 4,030 | 4,005 | 3,895 | 3,990 | 4,070 | 4,125 | 4,105 | 4,100 |
| Concord | 44,275 | 45,180 | 44,275 | 47,810 | 50,040 | 61,695 | 62,565 | 62,785 | 64,370 |
| Danville | 15,420 | 15,380 | 15,420 | 15,470 | 15,575 | 15,730 | 16,095 | 16,040 | 16,020 |
| El Cerrito | 10,140 | 10,195 | 10,140 | 10,430 | 11,530 | 11,745 | 11,980 | 12,050 | 12,105 |
| Hercules | 8,115 | 8,135 | 8,115 | 8,490 | 8,645 | 8,800 | 8,900 | 8,900 | 9,655 |
| Lafayette | 9,220 | 9,390 | 9,220 | 9,430 | 9,525 | 9,605 | 9,760 | 9,915 | 9,970 |
| Martinez | 14,285 | 14,445 | 14,285 | 14,175 | 14,465 | 14,815 | 15,090 | 15,130 | 15,315 |
| Moraga | 5,570 | 5,615 | 5,570 | 5,625 | 5,690 | 5,735 | 5,800 | 5,900 | 5,920 |
| Oakley | 10,725 | 11,675 | 10,725 | 10,355 | 10,645 | 11,105 | 14,865 | 15,030 | 16,405 |
| Orinda | 6,550 | 6,760 | 6,550 | 6,725 | 6,765 | 6,795 | 6,825 | 6,840 | 6,825 |
| Pinole | 6,775 | 6,760 | 6,775 | 6,775 | 6,950 | 7,055 | 7,275 | 7,275 | 7,290 |
| Pittsburg | 19,525 | 20,325 | 19,525 | 19,750 | 20,340 | 21,250 | 22,255 | 25,750 | 26,525 |
| Pleasant Hill | 13,705 | 13,765 | 13,705 | 13,595 | 13,815 | 14,055 | 14,330 | 14,280 | 14,305 |
| Richmond | 36,090 | 37,070 | 36,090 | 40,270 | 42,720 | 44,310 | 48,625 | 51,840 | 54,910 |
| San Pablo | 8,760 | 8,920 | 8,760 | 8,935 | 9,285 | 9,510 | 9,620 | 9,720 | 9,805 |
| San Ramon | 25,280 | 26,680 | 25,280 | 27,440 | 28,070 | 28,830 | 29,160 | 29,750 | 30,285 |
| Walnut Creek | 30,440 | 31,680 | 30,440 | 31,500 | 32,505 | 33,530 | 34,745 | 37,075 | 37,535 |
| Unincorporated | 57,705 | 59,790 | 57,705 | 58,335 | 59,480 | 62,780 | 64,190 | 65,195 | 67,665 |
| County | 375,360 | 387,920 | 375,360 | 386,755 | 399,615 | 422,435 | 440,760 | 461,065 | 475,385 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## CONTRA COSTA PERSONS PER HOUSEHOLD

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 3.15 | 3.23 | 3.13 | 3.14 | 3.14 | 3.14 | 3.16 | 3.20 | 3.22 |
| Brentwood | 3.11 | 3.19 | 3.14 | 3.15 | 3.13 | 3.13 | 3.15 | 3.17 | 3.23 |
| Clayton | 2.72 | 2.78 | 2.66 | 2.67 | 2.66 | 2.67 | 2.68 | 2.71 | 2.74 |
| Concord | 2.73 | 2.80 | 2.74 | 2.67 | 2.67 | 2.79 | 2.82 | 2.86 | 2.87 |
| Danville | 2.71 | 2.78 | 2.75 | 2.87 | 2.86 | 2.86 | 2.88 | 2.91 | 2.95 |
| El Cerrito | 2.31 | 2.37 | 2.31 | 2.32 | 2.32 | 2.32 | 2.33 | 2.36 | 2.39 |
| Hercules | 2.96 | 3.03 | 2.91 | 2.90 | 2.90 | 2.89 | 2.90 | 2.93 | 2.96 |
| Lafayette | 2.58 | 2.64 | 2.59 | 2.59 | 2.59 | 2.60 | 2.61 | 2.63 | 2.67 |
| Martinez | 2.42 | 2.48 | 2.43 | 2.44 | 2.44 | 2.44 | 2.44 | 2.47 | 2.50 |
| Moraga | 2.57 | 2.63 | 2.59 | 2.59 | 2.59 | 2.60 | 2.61 | 2.63 | 2.67 |
| Oakley | 3.29 | 3.37 | 3.28 | 3.30 | 3.31 | 3.30 | 3.25 | 3.28 | 3.31 |
| Orinda | 2.69 | 2.75 | 2.63 | 2.64 | 2.64 | 2.65 | 2.66 | 2.69 | 2.73 |
| Pinole | 2.70 | 2.77 | 2.78 | 2.82 | 2.81 | 2.83 | 2.85 | 2.88 | 2.92 |
| Pittsburg | 3.22 | 3.30 | 3.23 | 3.55 | 3.58 | 3.49 | 3.38 | 3.36 | 3.44 |
| Pleasant Hill | 2.38 | 2.44 | 2.38 | 2.40 | 2.40 | 2.40 | 2.41 | 2.44 | 2.47 |
| Richmond | 2.83 | 2.90 | 2.83 | 2.95 | 2.94 | 2.95 | 2.96 | 2.96 | 2.97 |
| San Pablo | 3.28 | 3.36 | 3.34 | 3.35 | 3.34 | 3.34 | 3.35 | 3.38 | 3.41 |
| San Ramon | 2.85 | 2.92 | 2.81 | 2.72 | 2.71 | 2.71 | 2.72 | 2.74 | 2.77 |
| Walnut Creek | 2.08 | 2.13 | 2.11 | 2.10 | 2.10 | 2.09 | 2.10 | 2.10 | 2.14 |
| Unincorporated | 2.75 | 2.82 | 2.80 | 2.82 | 2.82 | 2.83 | 2.85 | 2.88 | 2.92 |
| County | 2.77 | 2.84 | 2.78 | 2.80 | 2.80 | 2.81 | 2.83 | 2.86 | 2.89 |

Source: Calculated from Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## CONTRA COSTA EMPLOYED RESIDENTS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 44,170 | 48,785 | 48,385 | 52,475 | 53,060 | 53,250 | 55,185 | 59,340 | 61,020 |
| Brentwood | 21,990 | 26,550 | 18,095 | 19,115 | 19,450 | 19,655 | 21,345 | 28,080 | 29,030 |
| Clayton | 5,240 | 5,850 | 6,245 | 6,960 | 7,040 | 7,115 | 7,135 | 7,060 | 6,975 |
| Concord | 61,055 | 63,620 | 61,520 | 72,255 | 74,380 | 94,205 | 94,610 | 93,595 | 93,480 |
| Danville | 18,725 | 20,360 | 21,280 | 25,995 | 26,090 | 26,325 | 26,910 | 26,795 | 26,630 |
| El Cerrito | 12,260 | 12,610 | 12,590 | 14,665 | 16,075 | 16,170 | 16,350 | 16,225 | 16,170 |
| Hercules | 12,420 | 13,845 | 12,370 | 14,340 | 14,390 | 14,425 | 14,430 | 14,285 | 15,300 |
| Lafayette | 11,095 | 11,990 | 12,185 | 14,460 | 14,610 | 14,700 | 14,920 | 15,085 | 15,030 |
| Martinez | 18,365 | 20,380 | 19,565 | 21,895 | 22,045 | 22,165 | 22,250 | 22,035 | 22,000 |
| Moraga | 6,805 | 7,290 | 7,620 | 8,895 | 9,045 | 9,155 | 9,285 | 9,440 | 9,400 |
| Oakley | 15,595 | 18,815 | 15,425 | 16,135 | 16,120 | 16,250 | 21,470 | 21,420 | 23,080 |
| Orinda | 7,925 | 8,815 | 8,275 | 10,135 | 10,270 | 10,400 | 10,495 | 10,485 | 10,435 |
| Pinole | 8,635 | 9,775 | 9,345 | 10,500 | 10,550 | 10,625 | 10,820 | 10,740 | 10,665 |
| Pittsburg | 28,320 | 31,935 | 27,185 | 33,770 | 34,495 | 34,280 | 33,660 | 38,615 | 39,380 |
| Pleasant Hill | 16,510 | 18,080 | 17,420 | 19,610 | 19,660 | 19,765 | 19,960 | 19,680 | 19,550 |
| Richmond | 46,720 | 52,185 | 44,610 | 55,915 | 58,045 | 59,230 | 63,300 | 66,955 | 70,010 |
| San Pablo | 12,185 | 14,340 | 10,970 | 12,575 | 12,850 | 12,960 | 12,950 | 12,905 | 12,840 |
| San Ramon | 35,670 | 36,870 | 36,240 | 43,895 | 44,780 | 45,745 | 45,920 | 46,615 | 46,940 |
| Walnut Creek | 30,805 | 30,885 | 32,075 | 37,650 | 38,345 | 39,035 | 39,940 | 42,270 | 42,240 |
| Unincorporated | 73,240 | 83,220 | 76,035 | 87,830 | 88,515 | 91,720 | 92,895 | 93,505 | 95,700 |
| County | 487,735 | 536,210 | 497,445 | 579,075 | 589,810 | 617,185 | 633,830 | 655,135 | 665,875 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## CONTRA COSTA TOTAL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 21,065 | 22,975 | 20,115 | 21,040 | 21,830 | 22,490 | 23,655 | 25,270 | 25,745 |
| Brentwood | 9,245 | 13,185 | 11,625 | 10,780 | 10,870 | 11,090 | 11,525 | 11,865 | 11,990 |
| Clayton | 1,490 | 1,865 | 1,995 | 2,080 | 2,110 | 2,125 | 2,130 | 2,135 | 2,095 |
| Concord | 51,150 | 59,385 | 54,275 | 64,205 | 64,550 | 66,255 | 87,870 | 94,310 | 95,455 |
| Danville | 14,590 | 14,115 | 11,840 | 13,000 | 13,065 | 13,090 | 13,115 | 13,145 | 13,120 |
| El Cerrito | 6,295 | 6,520 | 5,315 | 6,005 | 5,580 | 5,630 | 5,805 | 5,850 | 5,910 |
| Hercules | 3,745 | 4,960 | 4,955 | 5,245 | 5,280 | 5,365 | 5,500 | 5,615 | 5,420 |
| Lafayette | 10,435 | 12,150 | 8,990 | 10,410 | 10,450 | 10,435 | 10,205 | 10,095 | 9,940 |
| Martinez | 22,435 | 21,610 | 20,710 | 24,750 | 24,845 | 25,110 | 25,645 | 26,010 | 26,085 |
| Moraga | 4,135 | 5,020 | 4,570 | 5,530 | 5,630 | 5,665 | 5,695 | 5,710 | 5,725 |
| Oakley | 3,670 | 4,360 | 3,410 | 3,205 | 3,230 | 3,250 | 3,660 | 4,740 | 5,365 |
| Orinda | 4,850 | 4,895 | 4,835 | 5,465 | 5,495 | 5,505 | 5,505 | 5,500 | 5,500 |
| Pinole | 5,370 | 6,015 | 6,700 | 7,740 | 7,950 | 8,080 | 8,300 | 8,445 | 8,485 |
| Pittsburg | 13,935 | 15,085 | 11,835 | 12,635 | 13,330 | 13,800 | 14,675 | 15,690 | 15,615 |
| Pleasant Hill | 17,755 | 16,825 | 16,360 | 18,825 | 19,180 | 19,405 | 19,545 | 19,790 | 19,800 |
| Richmond | 31,345 | 34,200 | 30,685 | 38,565 | 42,685 | 46,725 | 52,920 | 60,345 | 61,815 |
| San Pablo | 5,815 | 6,340 | 7,430 | 8,125 | 8,370 | 8,535 | 8,895 | 9,125 | 9,100 |
| San Ramon | 39,005 | 44,515 | 47,950 | 53,635 | 53,850 | 54,340 | 55,330 | 62,735 | 71,775 |
| Walnut Creek | 56,990 | 60,220 | 50,855 | 57,370 | 57,520 | 57,885 | 58,380 | 56,570 | 58,090 |
| Unincorporated | 37,595 | 42,195 | 35,790 | 37,515 | 38,460 | 39,065 | 39,895 | 40,870 | 41,085 |
| County | 360,915 | 396,435 | 360,230 | 406,130 | 414,290 | 423,845 | 458,255 | 483,810 | 498,115 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## CONTRA COSTA AGRICULTURE AND NATURAL RESOURCES JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 0 | 5 | 15 | 30 | 30 | 35 | 35 | 35 | 35 |
| Brentwood | 115 | 130 | 145 | 150 | 150 | 150 | 150 | 130 | 130 |
| Clayton | 0 | 0 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Concord | 40 | 60 | 85 | 125 | 125 | 125 | 125 | 130 | 130 |
| Danville | 15 | 5 | 25 | 35 | 35 | 35 | 35 | 35 | 35 |
| El Cerrito | 0 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 0 |
| Hercules | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 5 |
| Lafayette | 10 | 5 | 15 | 20 | 20 | 20 | 20 | 20 | 20 |
| Martinez | 5 | 65 | 10 | 25 | 20 | 20 | 20 | 20 | 25 |
| Moraga | 0 | 5 | 0 | 5 | 5 | 5 | 5 | 5 | 5 |
| Oakley | 65 | 60 | 20 | 25 | 25 | 25 | 25 | 25 | 25 |
| Orinda | 50 | 15 | 20 | 20 | 20 | 20 | 20 | 20 | 20 |
| Pinole | 0 | 0 | 5 | 10 | 10 | 10 | 10 | 10 | 10 |
| Pittsburg | 0 | 0 | 15 | 25 | 25 | 25 | 25 | 25 | 25 |
| Pleasant Hill | 5 | 10 | 15 | 25 | 25 | 25 | 25 | 25 | 25 |
| Richmond | 545 | 650 | 175 | 185 | 185 | 185 | 185 | 180 | 180 |
| San Pablo | 0 | 0 | 15 | 15 | 15 | 15 | 15 | 15 | 15 |
| San Ramon | 595 | 5 | 395 | 475 | 475 | 475 | 475 | 475 | 485 |
| Walnut Creek | 10 | 15 | 30 | 50 | 55 | 55 | 55 | 55 | 55 |
| Unincorporated | 190 | 175 | 200 | 220 | 220 | 220 | 220 | 220 | 215 |
| County | 1,660 | 1,550 | 1,195 | 1,450 | 1,450 | 1,455 | 1,450 | 1,430 | 1,440 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## CONTRA COSTA MANUFACTURING, WHOLESALE AND TRANSPORTATION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 905 | 1,020 | 1,160 | 1,200 | 1,330 | 1,420 | 1,580 | 1,770 | 1,845 |
| Brentwood | 505 | 535 | 520 | 495 | 520 | 555 | 595 | 610 | 635 |
| Clayton | 90 | 110 | 65 | 70 | 70 | 70 | 70 | 70 | 70 |
| Concord | 5,270 | 5,090 | 5,960 | 6,670 | 6,665 | 6,720 | 7,215 | 7,290 | 7,320 |
| Danville | 570 | 505 | 815 | 855 | 860 | 860 | 855 | 850 | 850 |
| El Cerrito | 185 | 250 | 145 | 195 | 190 | 210 | 205 | 200 | 205 |
| Hercules | 185 | 995 | 1,865 | 1,695 | 1,605 | 1,545 | 1,505 | 1,450 | 1,355 |
| Lafayette | 405 | 365 | 950 | 1,010 | 1,010 | 1,005 | 970 | 950 | 935 |
| Martinez | 575 | 680 | 2,915 | 2,840 | 2,735 | 2,655 | 2,605 | 2,520 | 2,445 |
| Moraga | 45 | 75 | 280 | 325 | 335 | 335 | 340 | 330 | 330 |
| Oakley | 335 | 600 | 170 | 160 | 175 | 180 | 205 | 340 | 415 |
| Orinda | 190 | 115 | 185 | 195 | 195 | 195 | 195 | 195 | 195 |
| Pinole | 230 | 170 | 1,095 | 1,025 | 995 | 955 | 935 | 905 | 895 |
| Pittsburg | 2,560 | 2,405 | 1,405 | 1,455 | 1,540 | 1,580 | 1,685 | 1,855 | 1,885 |
| Pleasant Hill | 625 | 455 | 570 | 670 | 690 | 695 | 695 | 680 | 670 |
| Richmond | 7,795 | 8,770 | 6,715 | 6,945 | 7,225 | 7,425 | 7,890 | 8,265 | 8,330 |
| San Pablo | 400 | 85 | 495 | 485 | 505 | 545 | 600 | 630 | 640 |
| San Ramon | 6,550 | 5,035 | 3,580 | 3,685 | 3,645 | 3,600 | 3,530 | 3,880 | 3,765 |
| Walnut Creek | 2,215 | 2,425 | 2,875 | 2,975 | 2,880 | 2,800 | 2,675 | 2,450 | 2,410 |
| Unincorporated | 4,290 | 4,815 | 4,720 | 4,385 | 4,410 | 4,430 | 4,525 | 4,700 | 4,765 |
| County | 35,380 | 35,790 | 36,490 | 37,330 | 37,580 | 37,785 | 38,875 | 39,945 | 39,960 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## CONTRA COSTA RETAIL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 4,295 | 4,400 | 4,340 | 4,515 | 4,590 | 4,615 | 4,715 | 4,970 | 5,125 |
| Brentwood | 2,055 | 2,595 | 1,830 | 1,860 | 1,905 | 1,930 | 2,040 | 2,490 | 2,660 |
| Clayton | 290 | 325 | 120 | 130 | 130 | 130 | 130 | 130 | 125 |
| Concord | 8,880 | 9,455 | 7,050 | 6,105 | 5,735 | 6,260 | 6,225 | 6,170 | 6,140 |
| Danville | 1,665 | 1,490 | 1,380 | 1,395 | 1,400 | 1,410 | 1,440 | 1,435 | 1,430 |
| El Cerrito | 1,775 | 1,820 | 1,140 | 1,220 | 1,315 | 1,320 | 1,325 | 1,300 | 1,295 |
| Hercules | 345 | 360 | 370 | 395 | 400 | 390 | 390 | 385 | 400 |
| Lafayette | 1,350 | 1,500 | 695 | 735 | 730 | 730 | 735 | 740 | 740 |
| Martinez | 1,305 | 1,370 | 1,155 | 1,215 | 1,210 | 1,220 | 1,220 | 1,205 | 1,190 |
| Moraga | 480 | 485 | 570 | 595 | 595 | 590 | 585 | 595 | 595 |
| Oakley | 460 | 425 | 755 | 755 | 790 | 800 | 1,025 | 1,035 | 1,095 |
| Orinda | 360 | 390 | 380 | 390 | 390 | 390 | 390 | 385 | 385 |
| Pinole | 1,540 | 1,795 | 1,295 | 1,445 | 1,440 | 1,430 | 1,430 | 1,400 | 1,395 |
| Pittsburg | 2,555 | 2,355 | 1,790 | 1,995 | 2,015 | 2,015 | 2,045 | 2,250 | 2,350 |
| Pleasant Hill | 3,285 | 2,795 | 1,580 | 1,725 | 1,665 | 1,660 | 1,655 | 1,640 | 1,605 |
| Richmond | 3,465 | 4,365 | 3,800 | 4,560 | 4,640 | 4,725 | 5,050 | 5,275 | 5,420 |
| San Pablo | 950 | 1,260 | 760 | 840 | 840 | 835 | 830 | 825 | 820 |
| San Ramon | 3,220 | 2,835 | 4,020 | 6,065 | 6,200 | 6,350 | 6,405 | 6,465 | 6,560 |
| Walnut Creek | 6,980 | 7,225 | 5,585 | 5,900 | 5,995 | 6,145 | 6,295 | 6,490 | 6,565 |
| Unincorporated | 2,515 | 2,550 | 3,790 | 4,005 | 4,010 | 4,190 | 4,205 | 4,205 | 4,275 |
| County | 46,405 | 48,415 | 42,410 | 45,825 | 45,985 | 47,140 | 48,140 | 49,380 | 50,180 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## CONTRA COSTA FINANCIAL AND PROFESSIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 1,845 | 2,110 | 3,705 | 3,705 | 3,555 | 3,445 | 3,385 | 3,355 | 3,175 |
| Brentwood | 1,035 | 1,535 | 2,890 | 2,435 | 2,285 | 2,190 | 2,105 | 1,895 | 1,745 |
| Clayton | 145 | 320 | 405 | 425 | 430 | 430 | 435 | 435 | 425 |
| Concord | 14,700 | 17,515 | 12,795 | 17,210 | 17,005 | 16,815 | 21,340 | 21,920 | 21,655 |
| Danville | 2,975 | 3,070 | 3,975 | 4,555 | 4,555 | 4,555 | 4,550 | 4,545 | 4,495 |
| El Cerrito | 875 | 685 | 1,030 | 1,115 | 905 | 860 | 840 | 815 | 775 |
| Hercules | 1,580 | 1,320 | 800 | 985 | 980 | 985 | 1,005 | 1,040 | 970 |
| Lafayette | 3,230 | 3,145 | 2,715 | 3,260 | 3,250 | 3,230 | 3,145 | 3,080 | 3,005 |
| Martinez | 2,090 | 1,750 | 2,400 | 4,590 | 4,675 | 4,850 | 5,125 | 5,485 | 5,570 |
| Moraga | 435 | 490 | 1,135 | 1,610 | 1,615 | 1,645 | 1,650 | 1,675 | 1,670 |
| Oakley | 410 | 415 | 830 | 675 | 625 | 580 | 560 | 555 | 530 |
| Orinda | 1,380 | 1,345 | 1,920 | 2,215 | 2,230 | 2,230 | 2,235 | 2,230 | 2,235 |
| Pinole | 510 | 355 | 1,225 | 1,420 | 1,395 | 1,370 | 1,370 | 1,385 | 1,350 |
| Pittsburg | 1,400 | 1,755 | 1,510 | 1,615 | 1,580 | 1,570 | 1,575 | 1,580 | 1,460 |
| Pleasant Hill | 3,175 | 2,785 | 4,185 | 4,635 | 4,520 | 4,385 | 4,265 | 4,190 | 4,080 |
| Richmond | 4,470 | 4,625 | 5,285 | 7,100 | 8,130 | 9,925 | 12,025 | 15,485 | 15,720 |
| San Pablo | 420 | 490 | 920 | 1,110 | 1,115 | 1,095 | 1,110 | 1,115 | 1,065 |
| San Ramon | 11,595 | 17,765 | 11,130 | 15,625 | 16,220 | 17,080 | 18,180 | 18,960 | 27,570 |
| Walnut Creek | 19,010 | 17,705 | 16,640 | 19,795 | 19,140 | 18,535 | 18,295 | 17,455 | 17,030 |
| Unincorporated | 12,555 | 12,135 | 9,645 | 10,040 | 9,810 | 9,565 | 9,405 | 9,335 | 9,040 |
| County | 82,690 | 90,655 | 85,145 | 104,125 | 104,010 | 105,340 | 112,580 | 116,530 | 123,565 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## CONTRA COSTA HEALTH, EDUCATIONAL AND RECREATIONAL SERVICE JOBS

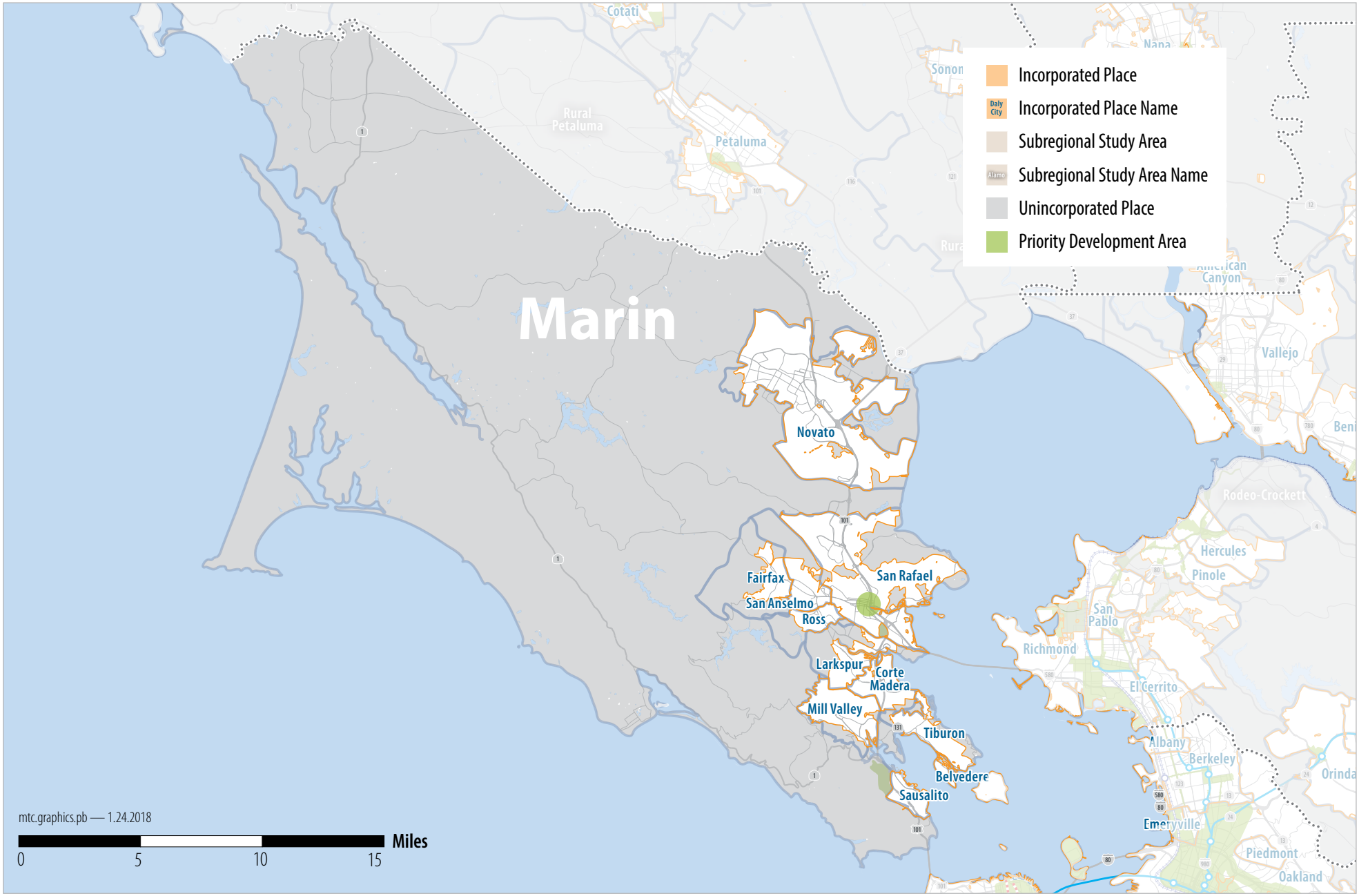
| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 10,155 | 10,965 | 7,465 | 7,275 | 7,550 | 7,790 | 8,180 | 8,980 | 9,180 |
| Brentwood | 2,930 | 4,750 | 3,650 | 3,270 | 3,380 | 3,495 | 3,710 | 3,850 | 3,875 |
| Clayton | 760 | 905 | 1,040 | 1,070 | 1,085 | 1,095 | 1,095 | 1,095 | 1,080 |
| Concord | 14,395 | 17,325 | 17,630 | 20,030 | 20,590 | 21,415 | 34,595 | 39,590 | 41,240 |
| Danville | 4,475 | 5,745 | 3,700 | 3,895 | 3,925 | 3,930 | 3,905 | 3,910 | 3,885 |
| El Cerrito | 2,630 | 2,655 | 2,090 | 2,190 | 1,950 | 1,965 | 2,115 | 2,245 | 2,310 |
| Hercules | 1,095 | 1,675 | 1,135 | 1,195 | 1,255 | 1,320 | 1,415 | 1,530 | 1,530 |
| Lafayette | 4,225 | 5,840 | 3,270 | 3,590 | 3,610 | 3,605 | 3,520 | 3,485 | 3,420 |
| Martinez | 3,530 | 3,510 | 3,205 | 4,625 | 5,140 | 5,690 | 6,385 | 7,035 | 7,635 |
| Moraga | 2,570 | 3,150 | 2,145 | 2,205 | 2,240 | 2,215 | 2,220 | 2,230 | 2,235 |
| Oakley | 1,060 | 1,330 | 995 | 925 | 920 | 945 | 1,020 | 1,485 | 1,710 |
| Orinda | 2,085 | 2,345 | 1,655 | 1,850 | 1,860 | 1,865 | 1,865 | 1,860 | 1,860 |
| Pinole | 2,480 | 3,050 | 2,270 | 2,520 | 2,645 | 2,725 | 2,880 | 3,060 | 3,155 |
| Pittsburg | 3,540 | 4,310 | 4,290 | 4,150 | 4,415 | 4,550 | 4,850 | 5,270 | 5,255 |
| Pleasant Hill | 6,220 | 7,065 | 7,205 | 7,965 | 8,315 | 8,590 | 8,900 | 9,365 | 9,630 |
| Richmond | 7,500 | 8,405 | 6,845 | 9,180 | 10,850 | 11,910 | 13,595 | 15,785 | 16,855 |
| San Pablo | 2,600 | 2,860 | 4,065 | 4,085 | 4,150 | 4,175 | 4,335 | 4,500 | 4,500 |
| San Ramon | 8,680 | 10,530 | 10,140 | 10,840 | 11,240 | 11,630 | 12,105 | 13,410 | 14,275 |
| Walnut Creek | 25,100 | 28,295 | 19,400 | 19,785 | 20,490 | 21,240 | 22,135 | 21,745 | 22,895 |
| Unincorporated | 10,550 | 12,570 | 9,480 | 9,855 | 10,465 | 10,760 | 11,225 | 11,955 | 12,310 |
| County | 116,420 | 136,485 | 111,670 | 120,500 | 126,070 | 130,905 | 150,045 | 162,385 | 168,830 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## CONTRA COSTA INFORMATION, GOVERNMENT AND CONSTRUCTION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Antioch | 3,860 | 4,480 | 3,430 | 4,315 | 4,775 | 5,190 | 5,770 | 6,160 | 6,390 |
| Brentwood | 2,610 | 3,640 | 2,580 | 2,575 | 2,635 | 2,770 | 2,920 | 2,895 | 2,945 |
| Clayton | 200 | 210 | 355 | 385 | 390 | 395 | 400 | 400 | 390 |
| Concord | 7,870 | 9,945 | 10,755 | 14,065 | 14,435 | 14,920 | 18,370 | 19,210 | 18,965 |
| Danville | 4,895 | 3,305 | 1,940 | 2,260 | 2,290 | 2,300 | 2,325 | 2,365 | 2,415 |
| El Cerrito | 830 | 1,110 | 910 | 1,280 | 1,215 | 1,270 | 1,315 | 1,285 | 1,315 |
| Hercules | 540 | 605 | 780 | 975 | 1,045 | 1,120 | 1,190 | 1,205 | 1,155 |
| Lafayette | 1,210 | 1,300 | 1,345 | 1,795 | 1,825 | 1,845 | 1,815 | 1,825 | 1,825 |
| Martinez | 14,930 | 14,235 | 11,020 | 11,460 | 11,065 | 10,670 | 10,290 | 9,745 | 9,220 |
| Moraga | 605 | 820 | 445 | 795 | 845 | 875 | 895 | 880 | 890 |
| Oakley | 1,335 | 1,535 | 635 | 665 | 695 | 725 | 830 | 1,295 | 1,595 |
| Orinda | 785 | 680 | 670 | 795 | 800 | 805 | 805 | 805 | 805 |
| Pinole | 615 | 640 | 810 | 1,325 | 1,470 | 1,590 | 1,675 | 1,690 | 1,685 |
| Pittsburg | 3,885 | 4,255 | 2,825 | 3,390 | 3,755 | 4,060 | 4,490 | 4,710 | 4,640 |
| Pleasant Hill | 4,450 | 3,710 | 2,805 | 3,805 | 3,970 | 4,050 | 4,015 | 3,895 | 3,795 |
| Richmond | 7,570 | 7,380 | 7,860 | 10,600 | 11,655 | 12,550 | 14,175 | 15,350 | 15,310 |
| San Pablo | 1,440 | 1,640 | 1,170 | 1,595 | 1,740 | 1,870 | 2,005 | 2,040 | 2,065 |
| San Ramon | 8,370 | 8,345 | 18,690 | 16,945 | 16,070 | 15,205 | 14,630 | 19,550 | 19,120 |
| Walnut Creek | 3,675 | 4,555 | 6,330 | 8,860 | 8,965 | 9,115 | 8,930 | 8,375 | 9,135 |
| Unincorporated | 7,495 | 9,950 | 7,955 | 9,010 | 9,545 | 9,895 | 10,320 | 10,455 | 10,475 |
| County | 78,365 | 83,545 | 83,320 | 96,895 | 99,195 | 101,225 | 107,165 | 114,140 | 114,135 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.


Incorporated Place
Incorporated Place Name
Subregional Study Area
Subregional Study Area Name
Unincorporated Place
Priority Development Area
Marin
Cotati
Rural Petaluma
Petaluma
Novato
Fairfax
San Anselmo
Ross
San Rafael
Larkspur
Corte Madera
Mill Valley
Tiburon
Belvedere
Sausalito
Vallejo
Rodeo-Crockett
Hercules
Pinole
San Pablo
Richmond
El Cerrito
Albany
Berkeley
Piedmont
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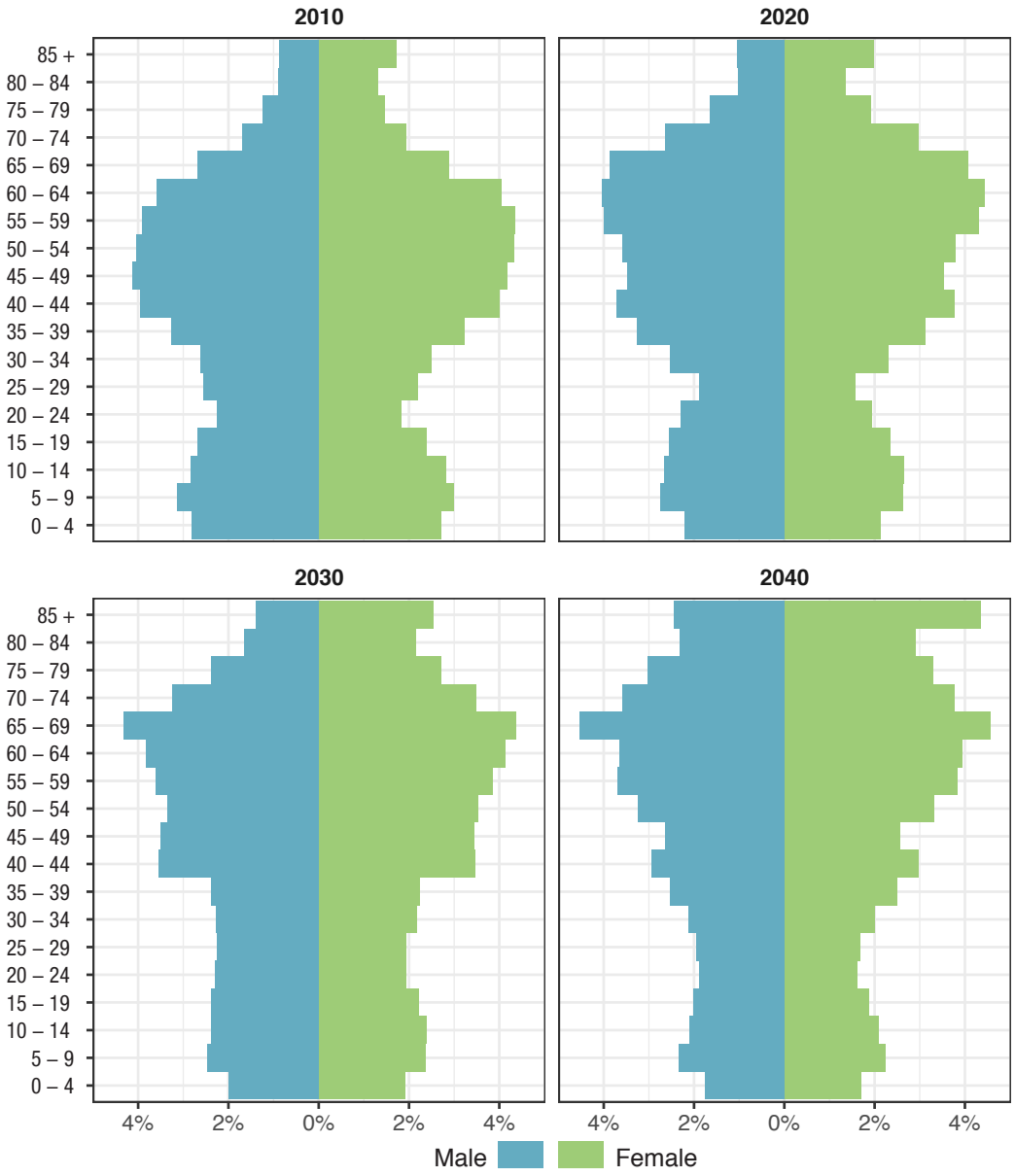
# Marin County

## MARIN DATA SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 252,410 | 262,305 | 252,920 | 262,420 | 265,875 | 269,250 | 274,530 | 278,215 | 282,670 |
| Household Population | 243,365 | 253,990 | 244,165 | 253,255 | 256,415 | 259,475 | 264,390 | 267,730 | 271,805 |
| Households | 103,210 | 103,110 | 103,210 | 106,790 | 108,195 | 109,375 | 111,065 | 111,350 | 111,585 |
| Persons per Household | 2.36 | 2.46 | 2.37 | 2.37 | 2.37 | 2.37 | 2.38 | 2.40 | 2.44 |
| Employed Residents | 125,625 | 130,745 | 109,320 | 129,925 | 130,665 | 131,210 | 132,390 | 132,130 | 131,575 |
| Agriculture & Natural Resources | 505 | 355 | 610 | 710 | 705 | 705 | 700 | 710 | 705 |
| Construction | 7,645 | 7,570 | 5,530 | 6,925 | 7,110 | 7,425 | 7,815 | 8,255 | 8,640 |
| Manufacturing & Wholesale | 5,565 | 7,705 | 4,210 | 4,230 | 4,175 | 4,235 | 4,220 | 4,055 | 3,950 |
| Retail | 16,595 | 16,255 | 14,930 | 14,195 | 13,830 | 13,365 | 12,840 | 12,305 | 12,085 |
| Transportation & Utilities | 1,530 | 1,190 | 2,285 | 2,445 | 2,470 | 2,510 | 2,575 | 2,605 | 2,690 |
| Information | 2,425 | 3,015 | 4,845 | 6,685 | 6,475 | 6,460 | 6,415 | 5,965 | 5,565 |
| Financial & Leasing | 8,825 | 8,330 | 12,020 | 12,255 | 11,865 | 11,100 | 10,670 | 10,385 | 9,820 |
| Professional & Managerial Services | 21,395 | 21,205 | 20,825 | 24,430 | 23,855 | 23,970 | 24,805 | 25,795 | 25,950 |
| Health & Educational Services | 20,870 | 24,605 | 21,835 | 23,175 | 24,805 | 26,425 | 28,385 | 30,475 | 32,435 |
| Arts, Recreation & Other Services | 23,465 | 24,355 | 20,185 | 19,880 | 19,575 | 19,630 | 20,070 | 20,350 | 20,380 |
| Government | 12,615 | 16,325 | 14,460 | 14,580 | 14,975 | 15,230 | 14,930 | 13,705 | 12,695 |
| Total Jobs | 121,435 | 130,905 | 121,730 | 129,510 | 129,845 | 131,065 | 133,425 | 134,600 | 134,915 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## Projected Age Distribution, Marin




Source: ABAG / MTC Plan Bay Area data

## COUNTY OVERVIEW

Marin County is known for its scenic beauty, with abundant open spaces that support farming, ranching, tourism, recreation, wildlife habitat, and water management. Reflecting the desire to protect and preserve the county's iconic landscapes, about half of its land area is protected as open space. Plan Bay Area, through its Priority Conservation Area program, is supportive of such efforts.

Urbanized areas are predominantly located in the eastern portion of the county, along US Highway 101. Marin County has low residential densities and low intensities of employment and retail uses. In addition to highway linkages, ferry terminals and Golden Gate Transit currently connect the county to the region, and the recently opened Sonoma-Marin Area Rail Transit (SMART) has further enhanced transit options between the two northern counties.

## POPULATION

In 2010, Marin was home to around 252,000 people, with 44 percent living in its two largest cities, San Rafael and Novato, and the remainder of Marin County's population living in unincorporated areas. Marin has long seen slower population growth than the rest of the region. The population of Marin County is estimated to grow by 12 percent to 283,000 people by 2040, while the number of households is estimated to grow by 8,390 during the next three decades. San Rafael and the unincorporated portion of the county will assume 33 percent and 27 percent of the total household growth in the county. As with the region in general, Marin's population is expected to continue aging, albeit from a higher starting point

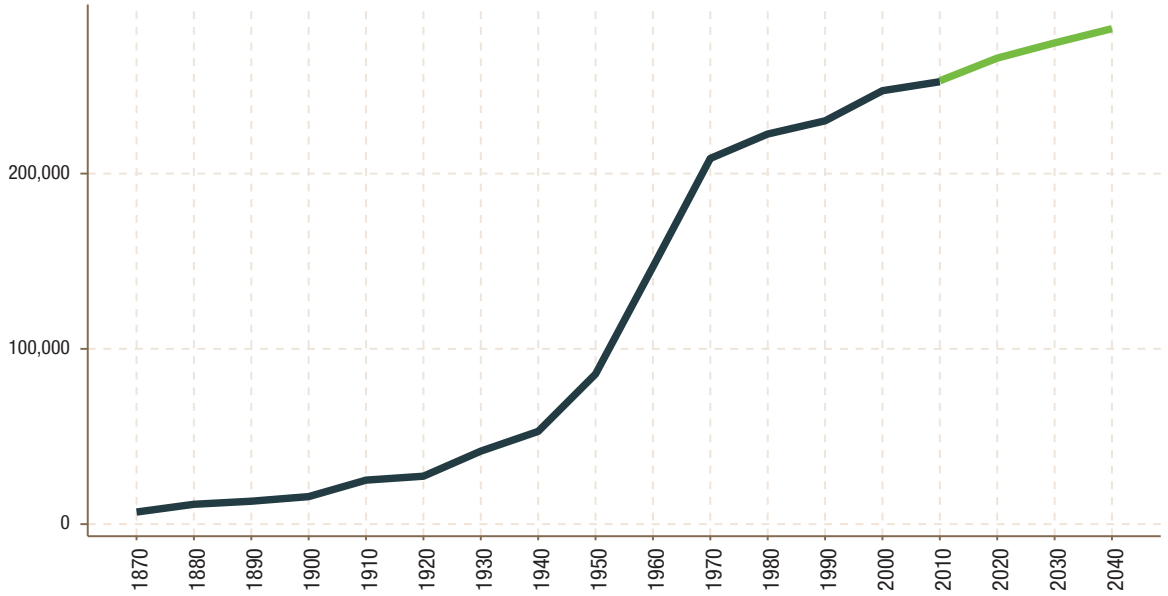
than all other counties in the region. The median age of Marin's current residents has been rising, and the aging of the county's population will have broad implications for the provision of public and private services.

## ECONOMY

Marin was relatively isolated from the region's major economic centers to the south for much of the county's history. The opening of the Golden Gate Bridge in the late 1930s added a connection to the largest job center in the region, and the completion of the Richmond-San Rafael Bridge in the 1950s added a link to Contra Costa County and its employment centers as well. Greater transportation access and industrialization associated with the Second World War spurred growth in Marin through the jobs generated at the ship yards in Sausalito and at the Hamilton Army Air Field in Novato. During the second half of the 20th Century, the county's economy changed to include tourism, financial services, and computer software companies. The Golden Gate Bridge and the Redwoods in Muir Woods are among the region's top tourist attractions.

In the 1980s, Marin became home to several corporate headquarters. A highly educated local workforce along with access to San Francisco and the rest of the region allow these businesses to operate effectively. Marin also has the highest per capita income of any county in the Bay Area. As a result, the county provides jobs to retail establishments and other consumer services catering to the local community.

### Historic and Projected Population, Marin




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

Today, Marin County's economy is based on educational and health services, professional and business services, tourism and retail. The largest sector in 2010, Professional and Managerial Services, comprised 18 percent of Marin's jobs. The county also has a small but prominent biomedical presence in pharmaceuticals and medical research. Between 2010 and 2040, the county is projected to have a net increase of 13,170 jobs, from 121,740 to 134,910, a growth rate of 11 percent, and San Rafael is estimated to take over 40 percent of the job growth. The great majority of the increase is estimated to have occurred by 2015.

Overall, Marin County will continue its slow and concentrated growth trend in the next three decades. The county, with both four percent of the region's jobs and population in 2010, is projected to assume about one percent of the Bay Area's total household growth and employment growth between 2010 and 2040. Growth is expected to be concentrated in San Rafael and unincorporated neighborhoods along Highway 101, including Marin City, where the two PDAs are located. More mixed-used development in these areas will provide a mix of housing, offer a range of jobs, focus intensive developments in nodes, and enhance existing commercial and industrial areas, with connection to transportation hubs and recreational opportunities.

# Data Tables for Marin County

## MARIN POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 2,070 | 2,155 | 2,080 | 2,215 | 2,225 | 2,240 | 2,240 | 2,265 | 2,285 |
| Corte Madera | 9,255 | 9,435 | 8,905 | 9,970 | 10,000 | 10,045 | 10,115 | 10,200 | 10,375 |
| Fairfax | 7,440 | 7,525 | 7,555 | 7,920 | 8,040 | 8,110 | 8,275 | 8,405 | 8,555 |
| Larkspur | 11,925 | 12,425 | 12,720 | 13,430 | 13,430 | 13,495 | 13,590 | 13,785 | 14,325 |
| Mill Valley | 13,905 | 14,795 | 14,080 | 14,875 | 14,920 | 14,965 | 15,050 | 15,150 | 15,310 |
| Novato | 51,905 | 54,365 | 51,890 | 52,305 | 53,325 | 53,925 | 54,905 | 55,645 | 56,295 |
| Ross | 2,415 | 2,525 | 2,390 | 2,510 | 2,520 | 2,545 | 2,570 | 2,595 | 2,625 |
| San Anselmo | 12,335 | 12,860 | 12,530 | 12,840 | 12,980 | 13,095 | 13,205 | 13,365 | 13,625 |
| San Rafael | 57,715 | 60,440 | 57,850 | 58,875 | 60,060 | 61,610 | 64,220 | 65,550 | 66,880 |
| Sausalito | 7,060 | 7,275 | 7,075 | 7,465 | 7,510 | 7,540 | 7,590 | 7,670 | 7,765 |
| Tiburon | 8,960 | 9,455 | 8,660 | 9,220 | 9,210 | 9,240 | 9,280 | 9,320 | 9,435 |
| Unincorporated | 67,425 | 69,045 | 67,195 | 70,800 | 71,665 | 72,440 | 73,490 | 74,270 | 75,190 |
| County | 252,410 | 262,305 | 252,920 | 262,420 | 265,875 | 269,250 | 274,530 | 278,215 | 282,670 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## MARIN HOUSEHOLD POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 2,070 | 2,155 | 2,080 | 2,215 | 2,225 | 2,240 | 2,240 | 2,265 | 2,285 |
| Corte Madera | 9,255 | 9,435 | 8,905 | 9,965 | 10,000 | 10,045 | 10,115 | 10,195 | 10,375 |
| Fairfax | 7,420 | 7,505 | 7,535 | 7,900 | 8,020 | 8,085 | 8,250 | 8,380 | 8,525 |
| Larkspur | 11,805 | 12,305 | 12,615 | 13,320 | 13,315 | 13,370 | 13,460 | 13,645 | 14,180 |
| Mill Valley | 13,825 | 14,720 | 14,015 | 14,810 | 14,855 | 14,895 | 14,975 | 15,070 | 15,225 |
| Novato | 51,280 | 53,740 | 51,295 | 51,675 | 52,655 | 53,220 | 54,160 | 54,855 | 55,465 |
| Ross | 2,365 | 2,475 | 2,335 | 2,455 | 2,460 | 2,485 | 2,505 | 2,525 | 2,555 |
| San Anselmo | 12,285 | 12,810 | 12,435 | 12,740 | 12,870 | 12,985 | 13,090 | 13,240 | 13,495 |
| San Rafael | 55,595 | 58,295 | 56,020 | 56,935 | 58,010 | 59,435 | 61,915 | 63,110 | 64,300 |
| Sausalito | 7,050 | 7,260 | 7,065 | 7,450 | 7,495 | 7,530 | 7,575 | 7,655 | 7,745 |
| Tiburon | 8,925 | 9,415 | 8,625 | 9,185 | 9,170 | 9,200 | 9,235 | 9,275 | 9,385 |
| Unincorporated | 61,505 | 63,880 | 61,240 | 64,605 | 65,340 | 65,990 | 66,870 | 67,510 | 68,265 |
| County | 243,365 | 253,990 | 244,165 | 253,255 | 256,415 | 259,475 | 264,390 | 267,730 | 271,805 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## MARIN HOUSEHOLDS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 930 | 925 | 930 | 985 | 985 | 995 | 990 | 990 | 990 |
| Corte Madera | 3,795 | 3,700 | 3,795 | 4,235 | 4,255 | 4,265 | 4,270 | 4,265 | 4,285 |
| Fairfax | 3,380 | 3,270 | 3,380 | 3,525 | 3,580 | 3,610 | 3,660 | 3,685 | 3,700 |
| Larkspur | 5,910 | 5,900 | 5,910 | 6,190 | 6,195 | 6,230 | 6,240 | 6,270 | 6,420 |
| Mill Valley | 6,085 | 6,200 | 6,085 | 6,400 | 6,425 | 6,425 | 6,430 | 6,410 | 6,385 |
| Novato | 20,280 | 20,345 | 20,280 | 20,295 | 20,695 | 20,915 | 21,175 | 21,225 | 21,195 |
| Ross | 800 | 800 | 800 | 830 | 835 | 840 | 845 | 840 | 840 |
| San Anselmo | 5,245 | 5,235 | 5,245 | 5,330 | 5,400 | 5,435 | 5,460 | 5,475 | 5,515 |
| San Rafael | 22,765 | 22,855 | 22,765 | 23,145 | 23,575 | 24,135 | 25,175 | 25,410 | 25,565 |
| Sausalito | 4,110 | 4,055 | 4,110 | 4,320 | 4,355 | 4,365 | 4,375 | 4,375 | 4,370 |
| Tiburon | 3,730 | 3,765 | 3,730 | 3,925 | 3,930 | 3,930 | 3,940 | 3,915 | 3,900 |
| Unincorporated | 26,195 | 26,055 | 26,195 | 27,615 | 27,960 | 28,235 | 28,500 | 28,485 | 28,425 |
| County | 103,210 | 103,110 | 103,210 | 106,790 | 108,195 | 109,375 | 111,065 | 111,350 | 111,585 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## MARIN PERSONS PER HOUSEHOLD

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 2.23 | 2.33 | 2.24 | 2.25 | 2.25 | 2.25 | 2.26 | 2.29 | 2.31 |
| Corte Madera | 2.44 | 2.55 | 2.35 | 2.35 | 2.35 | 2.36 | 2.37 | 2.39 | 2.42 |
| Fairfax | 2.20 | 2.29 | 2.23 | 2.24 | 2.24 | 2.24 | 2.25 | 2.27 | 2.30 |
| Larkspur | 2.00 | 2.09 | 2.14 | 2.15 | 2.15 | 2.15 | 2.16 | 2.18 | 2.21 |
| Mill Valley | 2.27 | 2.37 | 2.30 | 2.31 | 2.31 | 2.32 | 2.33 | 2.35 | 2.39 |
| Novato | 2.53 | 2.64 | 2.53 | 2.55 | 2.54 | 2.54 | 2.56 | 2.58 | 2.62 |
| Ross | 2.96 | 3.09 | 2.93 | 2.97 | 2.95 | 2.96 | 2.97 | 3.00 | 3.04 |
| San Anselmo | 2.34 | 2.45 | 2.37 | 2.39 | 2.38 | 2.39 | 2.40 | 2.42 | 2.45 |
| San Rafael | 2.44 | 2.55 | 2.46 | 2.46 | 2.46 | 2.46 | 2.46 | 2.48 | 2.52 |
| Sausalito | 1.71 | 1.79 | 1.72 | 1.73 | 1.72 | 1.72 | 1.73 | 1.75 | 1.77 |
| Tiburon | 2.39 | 2.50 | 2.31 | 2.34 | 2.33 | 2.34 | 2.34 | 2.37 | 2.41 |
| Unincorporated | 2.35 | 2.45 | 2.34 | 2.34 | 2.34 | 2.34 | 2.35 | 2.37 | 2.40 |
| County | 2.36 | 2.46 | 2.37 | 2.37 | 2.37 | 2.37 | 2.38 | 2.40 | 2.44 |

Source: Calculated from Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## MARIN EMPLOYED RESIDENTS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 650 | 725 | 765 | 1,015 | 1,040 | 1,075 | 1,095 | 1,110 | 1,100 |
| Corte Madera | 4,755 | 5,025 | 4,870 | 6,185 | 6,180 | 6,145 | 6,140 | 6,095 | 6,050 |
| Fairfax | 4,375 | 4,390 | 3,660 | 4,285 | 4,290 | 4,255 | 4,260 | 4,265 | 4,235 |
| Larkspur | 6,045 | 6,325 | 9,420 | 11,340 | 11,240 | 11,145 | 11,060 | 11,010 | 11,185 |
| Mill Valley | 6,580 | 6,805 | 5,450 | 6,720 | 6,780 | 6,830 | 6,875 | 6,840 | 6,790 |
| Novato | 26,065 | 28,310 | 16,665 | 19,150 | 19,345 | 19,320 | 19,390 | 19,285 | 19,090 |
| Ross | 800 | 900 | 770 | 920 | 915 | 915 | 910 | 905 | 905 |
| San Anselmo | 6,235 | 6,780 | 5,700 | 6,600 | 6,610 | 6,610 | 6,625 | 6,600 | 6,610 |
| San Rafael | 29,890 | 29,605 | 24,610 | 28,235 | 28,505 | 28,965 | 29,860 | 30,035 | 29,995 |
| Sausalito | 4,535 | 4,315 | 4,805 | 5,795 | 5,820 | 5,820 | 5,840 | 5,795 | 5,755 |
| Tiburon | 3,710 | 4,350 | 3,570 | 4,475 | 4,480 | 4,530 | 4,575 | 4,555 | 4,515 |
| Unincorporated | 31,975 | 33,215 | 29,030 | 35,205 | 35,460 | 35,595 | 35,755 | 35,635 | 35,345 |
| County | 125,625 | 130,745 | 109,320 | 129,925 | 130,665 | 131,210 | 132,390 | 132,130 | 131,575 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## MARIN TOTAL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 455 | 610 | 310 | 320 | 320 | 320 | 320 | 320 | 320 |
| Corte Madera | 6,935 | 7,545 | 6,495 | 6,605 | 6,660 | 6,775 | 6,950 | 7,080 | 7,160 |
| Fairfax | 2,015 | 2,065 | 1,550 | 1,555 | 1,565 | 1,575 | 1,640 | 1,660 | 1,660 |
| Larkspur | 6,720 | 7,790 | 7,500 | 7,410 | 7,375 | 7,515 | 7,670 | 7,740 | 7,665 |
| Mill Valley | 6,775 | 7,210 | 5,975 | 6,390 | 6,390 | 6,415 | 6,525 | 6,565 | 6,550 |
| Novato | 24,030 | 25,070 | 26,380 | 26,825 | 26,910 | 27,290 | 27,915 | 28,225 | 28,290 |
| Ross | 255 | 695 | 365 | 390 | 375 | 380 | 385 | 385 | 385 |
| San Anselmo | 3,930 | 4,330 | 3,315 | 3,205 | 3,215 | 3,250 | 3,350 | 3,415 | 3,420 |
| San Rafael | 40,855 | 43,255 | 43,430 | 47,685 | 47,835 | 48,140 | 48,650 | 48,875 | 49,050 |
| Sausalito | 6,565 | 6,535 | 5,215 | 5,690 | 5,650 | 5,700 | 5,825 | 5,860 | 5,885 |
| Tiburon | 2,265 | 2,755 | 2,840 | 2,925 | 2,910 | 2,895 | 2,935 | 2,945 | 2,925 |
| Unincorporated | 20,640 | 23,050 | 18,410 | 20,565 | 20,690 | 20,865 | 21,315 | 21,580 | 21,650 |
| County | 121,435 | 130,905 | 121,785 | 129,565 | 129,900 | 131,120 | 133,480 | 134,650 | 134,960 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## MARIN AGRICULTURE AND NATURAL RESOURCES JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 0 | 0 | 5 | 10 | 10 | 10 | 10 | 10 | 10 |
| Corte Madera | 0 | 0 | 5 | 0 | 0 | 5 | 5 | 5 | 5 |
| Fairfax | 0 | 0 | 5 | 5 | 5 | 10 | 5 | 5 | 5 |
| Larkspur | 15 | 5 | 5 | 10 | 10 | 10 | 15 | 15 | 10 |
| Mill Valley | 5 | 5 | 30 | 30 | 35 | 35 | 35 | 35 | 35 |
| Novato | 100 | 30 | 100 | 130 | 130 | 135 | 135 | 135 | 135 |
| Ross | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| San Anselmo | 20 | 5 | 0 | 5 | 5 | 5 | 5 | 5 | 5 |
| San Rafael | 85 | 75 | 90 | 125 | 125 | 125 | 125 | 125 | 130 |
| Sausalito | 5 | 15 | 20 | 20 | 20 | 20 | 20 | 20 | 20 |
| Tiburon | 0 | 5 | 30 | 25 | 25 | 25 | 25 | 25 | 25 |
| Unincorporated | 255 | 205 | 320 | 340 | 335 | 335 | 330 | 330 | 325 |
| County | 505 | 355 | 610 | 710 | 705 | 710 | 705 | 710 | 705 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## MARIN MANUFACTURING, WHOLESALE AND TRANSPORTATION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 0 | 5 | 0 | 5 | 5 | 5 | 5 | 5 | 5 |
| Corte Madera | 340 | 120 | 455 | 410 | 405 | 410 | 420 | 420 | 435 |
| Fairfax | 160 | 45 | 60 | 55 | 50 | 50 | 45 | 45 | 40 |
| Larkspur | 340 | 345 | 260 | 250 | 250 | 255 | 245 | 240 | 230 |
| Mill Valley | 160 | 175 | 270 | 275 | 265 | 260 | 260 | 250 | 235 |
| Novato | 1,175 | 3,185 | 1,235 | 1,245 | 1,275 | 1,320 | 1,330 | 1,285 | 1,265 |
| Ross | 0 | 5 | 10 | 15 | 10 | 15 | 15 | 15 | 15 |
| San Anselmo | 75 | 235 | 285 | 255 | 240 | 235 | 235 | 235 | 230 |
| San Rafael | 2,285 | 2,515 | 2,785 | 2,970 | 2,965 | 3,030 | 3,060 | 3,005 | 3,010 |
| Sausalito | 825 | 1,010 | 360 | 390 | 385 | 380 | 375 | 370 | 350 |
| Tiburon | 140 | 230 | 110 | 100 | 95 | 80 | 80 | 80 | 75 |
| Unincorporated | 675 | 660 | 650 | 680 | 675 | 685 | 695 | 685 | 705 |
| County | 7,095 | 8,895 | 6,480 | 6,650 | 6,620 | 6,720 | 6,765 | 6,625 | 6,595 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## MARIN RETAIL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 50 | 160 | 10 | 25 | 25 | 25 | 25 | 25 | 25 |
| Corte Madera | 2,335 | 2,395 | 1,625 | 1,810 | 1,810 | 1,805 | 1,785 | 1,750 | 1,735 |
| Fairfax | 360 | 510 | 225 | 195 | 185 | 165 | 155 | 140 | 125 |
| Larkspur | 825 | 760 | 1,255 | 1,130 | 1,120 | 1,125 | 1,105 | 1,095 | 1,110 |
| Mill Valley | 1,565 | 1,395 | 775 | 645 | 600 | 545 | 490 | 440 | 395 |
| Novato | 2,725 | 2,715 | 2,985 | 3,065 | 3,105 | 3,120 | 3,110 | 3,070 | 3,035 |
| Ross | 0 | 0 | 5 | 50 | 50 | 50 | 50 | 50 | 50 |
| San Anselmo | 610 | 505 | 605 | 630 | 630 | 635 | 630 | 620 | 615 |
| San Rafael | 6,320 | 5,820 | 5,245 | 4,445 | 4,140 | 3,770 | 3,405 | 3,075 | 2,975 |
| Sausalito | 395 | 530 | 500 | 410 | 390 | 360 | 345 | 340 | 340 |
| Tiburon | 105 | 185 | 135 | 125 | 120 | 120 | 100 | 90 | 85 |
| Unincorporated | 2,080 | 1,630 | 1,560 | 1,660 | 1,645 | 1,650 | 1,635 | 1,605 | 1,590 |
| County | 16,595 | 16,255 | 14,930 | 14,195 | 13,830 | 13,365 | 12,840 | 12,305 | 12,085 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## MARIN FINANCIAL AND PROFESSIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 130 | 130 | 145 | 145 | 145 | 145 | 145 | 145 | 145 |
| Corte Madera | 1,315 | 1,460 | 1,185 | 1,240 | 1,200 | 1,175 | 1,220 | 1,275 | 1,260 |
| Fairfax | 250 | 260 | 380 | 355 | 340 | 325 | 330 | 325 | 305 |
| Larkspur | 1,700 | 1,885 | 1,195 | 1,480 | 1,505 | 1,555 | 1,685 | 1,820 | 1,830 |
| Mill Valley | 940 | 1,150 | 1,680 | 1,885 | 1,835 | 1,800 | 1,820 | 1,835 | 1,790 |
| Novato | 8,990 | 7,150 | 10,330 | 10,110 | 9,645 | 9,350 | 9,195 | 9,180 | 8,960 |
| Ross | 5 | 90 | 50 | 50 | 50 | 55 | 55 | 55 | 55 |
| San Anselmo | 920 | 865 | 795 | 735 | 700 | 670 | 665 | 670 | 640 |
| San Rafael | 10,965 | 9,830 | 10,430 | 12,885 | 12,710 | 12,595 | 12,865 | 13,275 | 13,335 |
| Sausalito | 2,215 | 1,870 | 1,950 | 2,115 | 2,030 | 1,980 | 1,985 | 2,005 | 1,965 |
| Tiburon | 405 | 500 | 1,120 | 1,105 | 1,055 | 985 | 960 | 940 | 890 |
| Unincorporated | 2,905 | 3,635 | 3,635 | 4,635 | 4,570 | 4,510 | 4,620 | 4,735 | 4,675 |
| County | 30,220 | 29,535 | 32,895 | 36,750 | 35,785 | 35,140 | 35,545 | 36,255 | 35,845 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## MARIN HEALTH, EDUCATIONAL AND RECREATIONAL SERVICE JOBS

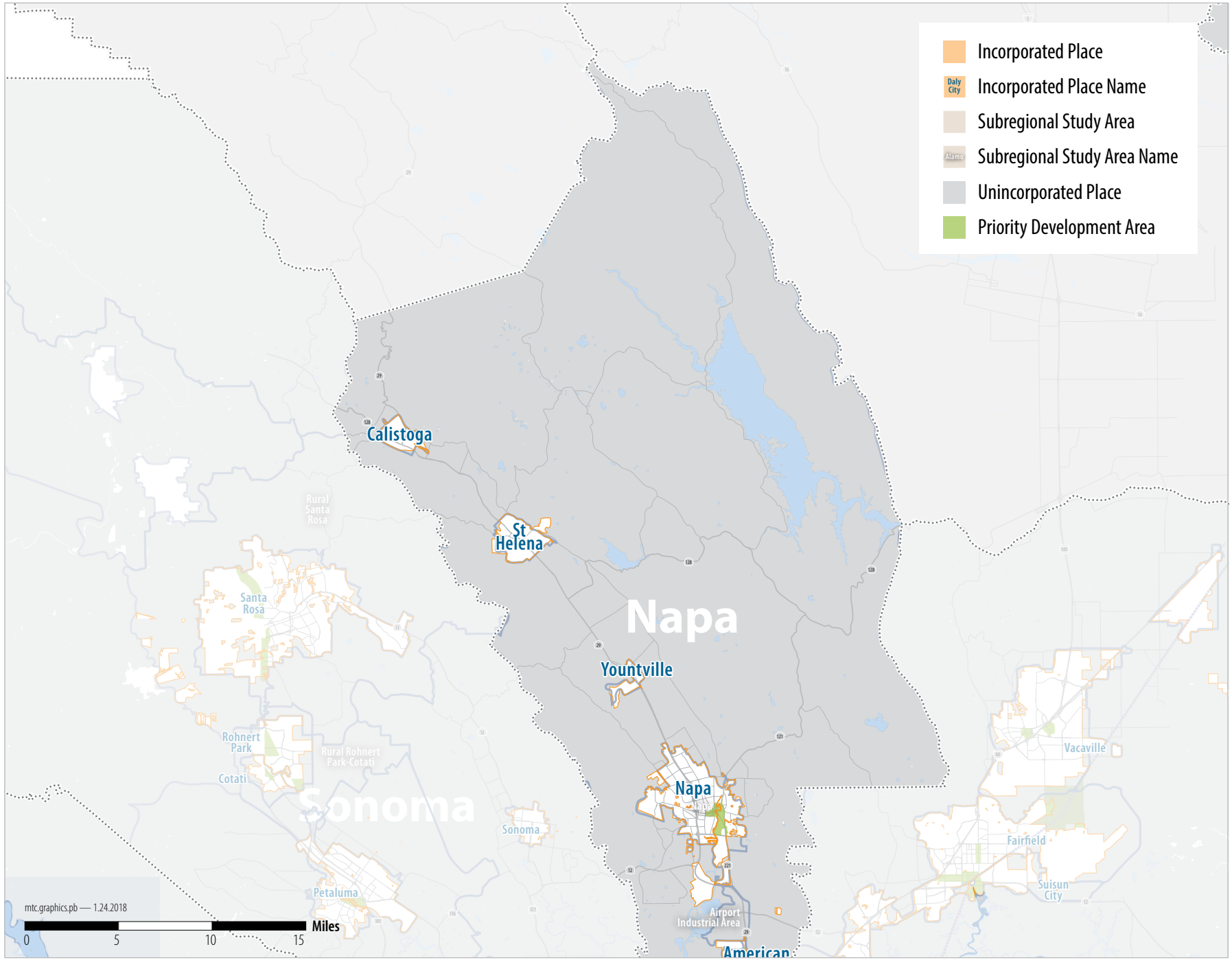
| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 180 | 200 | 100 | 90 | 90 | 90 | 90 | 90 | 90 |
| Corte Madera | 2,180 | 2,780 | 2,150 | 1,975 | 2,025 | 2,080 | 2,170 | 2,310 | 2,430 |
| Fairfax | 835 | 915 | 580 | 605 | 655 | 695 | 755 | 810 | 845 |
| Larkspur | 2,915 | 3,790 | 3,990 | 3,575 | 3,500 | 3,515 | 3,550 | 3,555 | 3,520 |
| Mill Valley | 2,980 | 3,285 | 2,420 | 2,430 | 2,475 | 2,540 | 2,630 | 2,745 | 2,850 |
| Novato | 6,935 | 7,615 | 6,895 | 7,070 | 7,450 | 7,980 | 8,700 | 9,305 | 9,900 |
| Ross | 250 | 525 | 250 | 215 | 205 | 200 | 200 | 200 | 195 |
| San Anselmo | 1,565 | 1,860 | 1,135 | 1,025 | 1,045 | 1,065 | 1,135 | 1,210 | 1,260 |
| San Rafael | 14,735 | 15,925 | 14,440 | 15,525 | 16,165 | 16,815 | 17,625 | 18,500 | 19,275 |
| Sausalito | 2,425 | 2,310 | 1,535 | 1,655 | 1,700 | 1,785 | 1,895 | 1,975 | 2,090 |
| Tiburon | 1,270 | 1,445 | 1,140 | 1,135 | 1,165 | 1,200 | 1,275 | 1,325 | 1,370 |
| Unincorporated | 8,930 | 9,495 | 7,380 | 7,755 | 7,910 | 8,085 | 8,435 | 8,790 | 9,000 |
| County | 44,330 | 48,955 | 42,015 | 43,055 | 44,380 | 46,050 | 48,455 | 50,825 | 52,820 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## MARIN INFORMATION, GOVERNMENT AND CONSTRUCTION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Belvedere | 90 | 115 | 45 | 45 | 45 | 45 | 45 | 45 | 45 |
| Corte Madera | 765 | 795 | 1,080 | 1,170 | 1,215 | 1,295 | 1,350 | 1,325 | 1,300 |
| Fairfax | 410 | 335 | 305 | 335 | 330 | 330 | 350 | 340 | 340 |
| Larkspur | 925 | 1,005 | 795 | 960 | 985 | 1,055 | 1,070 | 1,015 | 970 |
| Mill Valley | 1,130 | 1,200 | 805 | 1,125 | 1,175 | 1,240 | 1,295 | 1,265 | 1,245 |
| Novato | 4,105 | 4,375 | 4,830 | 5,195 | 5,305 | 5,390 | 5,445 | 5,240 | 4,995 |
| Ross | 5 | 80 | 50 | 60 | 60 | 60 | 65 | 65 | 70 |
| San Anselmo | 740 | 865 | 490 | 560 | 595 | 645 | 685 | 675 | 675 |
| San Rafael | 6,465 | 9,085 | 10,440 | 11,730 | 11,730 | 11,800 | 11,575 | 10,895 | 10,325 |
| Sausalito | 700 | 800 | 850 | 1,100 | 1,120 | 1,175 | 1,200 | 1,155 | 1,115 |
| Tiburon | 345 | 400 | 305 | 430 | 450 | 480 | 490 | 480 | 475 |
| Unincorporated | 5,790 | 7,420 | 4,865 | 5,495 | 5,560 | 5,605 | 5,605 | 5,435 | 5,355 |
| County | 22,690 | 26,910 | 24,855 | 28,200 | 28,575 | 29,130 | 29,170 | 27,935 | 26,905 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.


Incorporated Place
Daly City
Incorporated Place Name
Subregional Study Area
Alamo
Subregional Study Area Name
Unincorporated Place
Priority Development Area
Calistoga
St Helena
Napa
Yountville
Napa
Vacaville
Fairfield
Suisun City
Rural Santa Rosa
Santa Rosa
Rohnert Park
Rural Rohnert Park-Cotati
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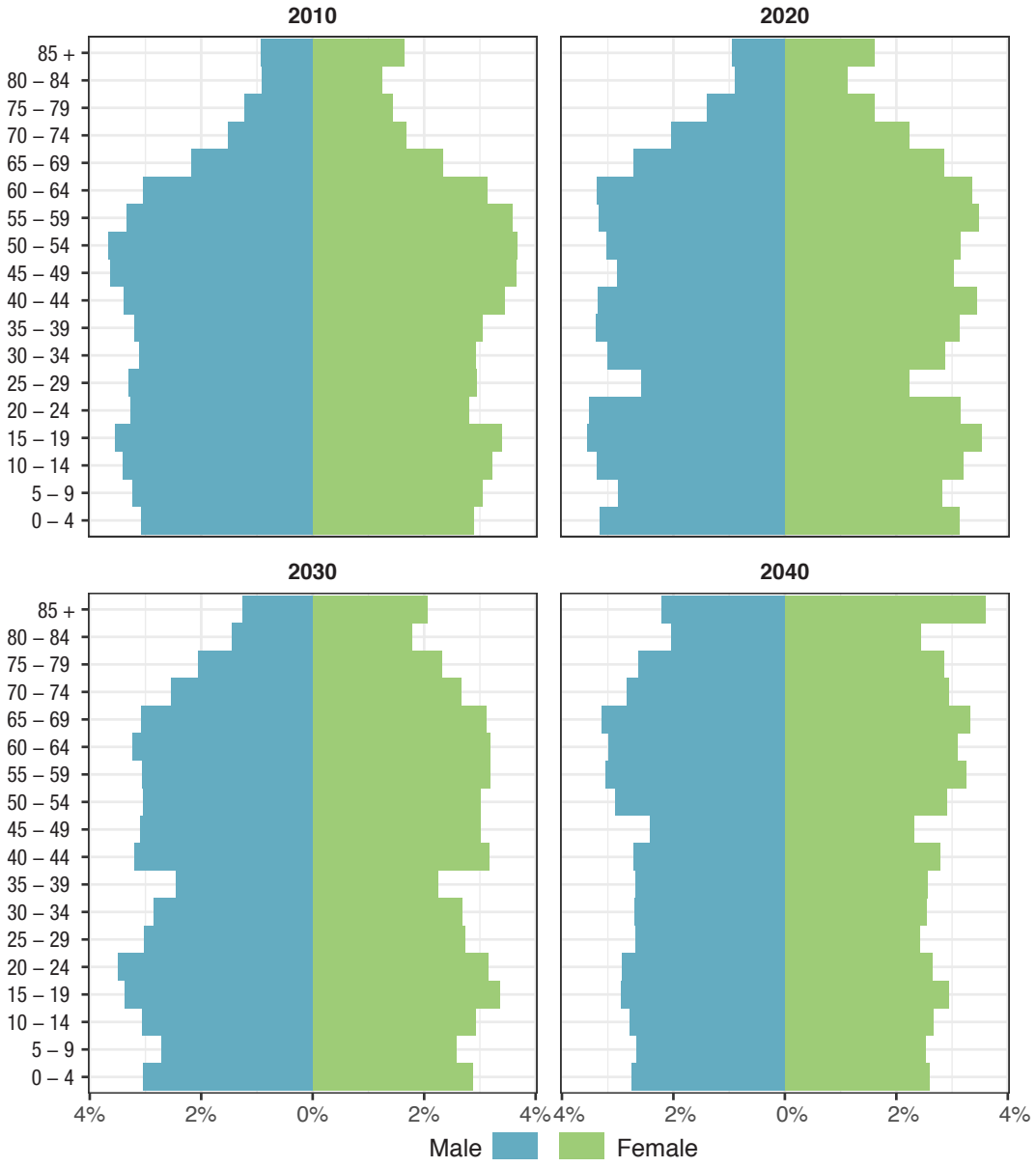
# Napa County

## NAPA DATA SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 136,485 | 140,990 | 135,880 | 136,885 | 141,240 | 146,130 | 151,445 | 155,860 | 158,050 |
| Household Population | 131,565 | 136,020 | 132,430 | 133,235 | 137,380 | 142,050 | 147,125 | 151,295 | 153,220 |
| Households | 48,875 | 49,800 | 48,875 | 48,750 | 50,365 | 52,080 | 53,710 | 54,670 | 54,625 |
| Persons per Household | 2.69 | 2.73 | 2.71 | 2.73 | 2.73 | 2.73 | 2.74 | 2.77 | 2.80 |
| Employed Residents | 65,555 | 71,145 | 66,455 | 73,680 | 74,670 | 75,530 | 76,370 | 76,655 | 75,565 |
| Agriculture & Natural Resources | 3,995 | 3,900 | 4,935 | 4,940 | 4,910 | 4,880 | 4,850 | 4,820 | 4,795 |
| Construction | 2,345 | 3,965 | 4,910 | 6,110 | 6,400 | 6,750 | 7,390 | 8,395 | 9,075 |
| Manufacturing & Wholesale | 8,215 | 7,905 | 12,535 | 11,655 | 11,850 | 11,970 | 12,190 | 12,720 | 12,665 |
| Retail | 6,980 | 6,515 | 6,280 | 7,590 | 7,705 | 7,685 | 7,660 | 7,640 | 7,520 |
| Transportation & Utilities | 1,045 | 1,510 | 1,845 | 2,090 | 2,195 | 2,245 | 2,390 | 2,650 | 2,830 |
| Information | 535 | 270 | 1,070 | 1,510 | 1,495 | 1,515 | 1,565 | 1,580 | 1,525 |
| Financial & Leasing | 2,455 | 2,560 | 3,470 | 3,170 | 3,025 | 2,790 | 2,600 | 2,455 | 3,145 |
| Professional & Managerial Services | 4,860 | 6,190 | 5,885 | 5,755 | 5,515 | 5,440 | 5,440 | 5,370 | 7,255 |
| Health & Educational Services | 15,625 | 19,045 | 8,830 | 9,095 | 9,750 | 10,260 | 10,930 | 12,190 | 14,305 |
| Arts, Recreation & Other Services | 16,515 | 21,325 | 12,880 | 11,715 | 11,515 | 11,380 | 11,500 | 11,935 | 13,110 |
| Government | 7,145 | 7,045 | 7,985 | 7,195 | 7,490 | 7,630 | 7,690 | 7,465 | 7,095 |
| Total Jobs | 69,715 | 80,235 | 70,635 | 70,830 | 71,855 | 72,535 | 74,210 | 77,220 | 83,320 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## Projected Age Distribution, Napa




Source: ABAG / MTC Plan Bay Area data

## COUNTY OVERVIEW

Napa County has been a leader in agricultural and open space preservation since the 1960s. In 1980, county voters passed the Slow Growth Initiative (Measure A), which restricts annual growth in unincorporated areas to one percent per year. Measure P, originally passed in 1990 and re-approved in 2008, requires voter approval prior to reclassifying agricultural lands in the county general plan, and stipulates that new growth be accommodated within established urban limit lines.

Consistent with these policies, Napa County is projected to take on 1 percent of the region's household growth and two percent of its job growth. The vast majority of future development is expected to occur in the cities of Napa and American Canyon. Napa is likely to remain the least populous county in the Bay Area through 2040.

Although the county currently lacks a regional commuter rail service, VINE provides local bus service and express service to transit centers in Solano and Sonoma counties, as well as the El Cerrito Del Norte BART station. Residents, employees, and visitors rely primarily on Highway 12 and local roads for access and local travel. Given the limited amount of planned growth and transit access, only two PDAs have been designated in the county.

## POPULATION

Reflecting the county's rural character, only two cities have a population over 10,000, while almost 20 percent of residents live in unincorporated county areas, for a total population of 136,000 in 2010. The largest of the five incorporated places is the city

of Napa, with 56 percent of the county's 2010 population. The next largest city, American Canyon, had 14 percent of the population.

The population of Napa County is projected to grow by 16 percent from 2010, adding over 22,000 new residents by 2040. Most of the household growth is expected in the city of Napa and in unincorporated areas, accounting for 42 percent and 39 percent of the increase, respectively. American Canyon could also accommodate 11 percent of the new households.

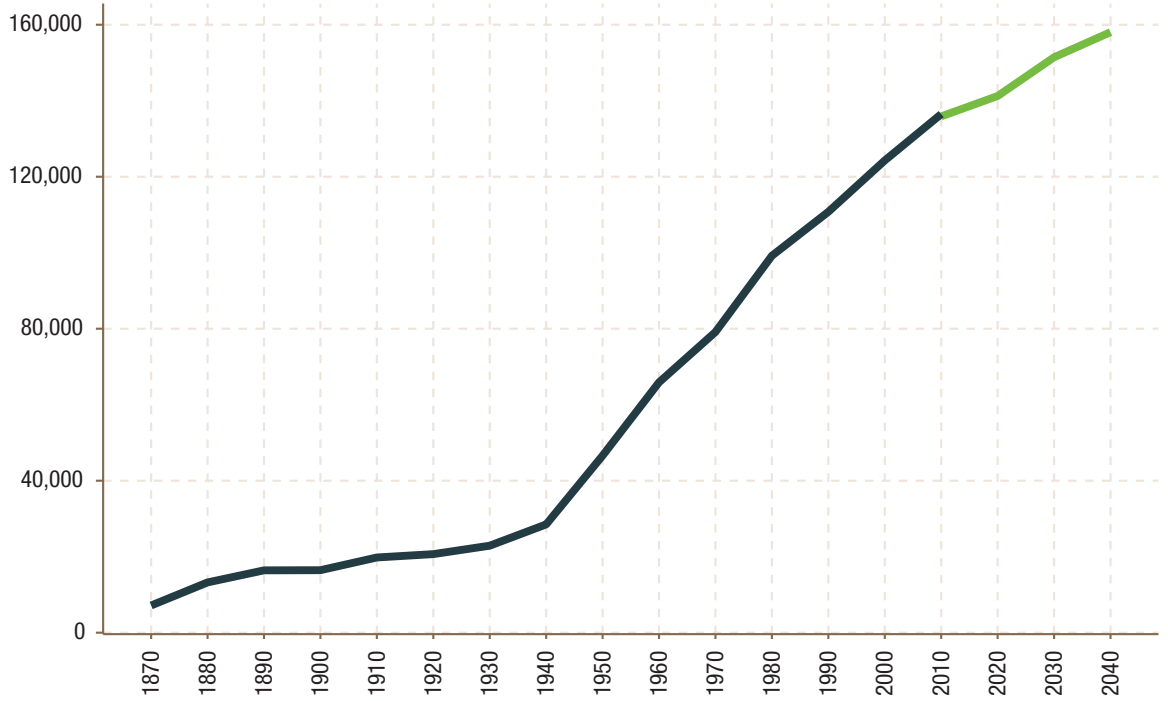
## ECONOMY

Napa County is a world-famous wine region, with vineyards dominating the agricultural landscape. In 2010, per model data, Agriculture and Natural Resources accounted for seven percent of its total jobs, the highest share of any Bay Area county. Also reflecting the strength of the wine industry, Arts, Recreation, and Other Services accounts for 17 percent of the county's employment. The wine industry has helped make tourism an important part of the county's economy, which attracts over four million visitors each year. A larger sector overall, driven primarily by the beverage sector, is Manufacturing and Wholesale, with 19 percent of all jobs.

Between 2010 and 2040, the number of jobs in Napa County is projected to grow by 18 percent or 12,680 new jobs from 70,660 to 83,340 jobs. By 2015, though, the job count was virtually unchanged from 2010.[8] Most of this employment will be channeled to the city of Napa and the city of American Canyon. In contrast, little job growth is projected for the communities of St. Helena, Calistoga and Yountville in the northern portion of the county.

Future growth in Napa County should primarily occur in the southern part of the county, particularly in the two Priority Development Areas (PDAs) within the city of Napa and the city of American Canyon, with the rest of the county maintaining its traditional rural and agricultural character. The two largest cities will have intensified mixed-use development in their downtown core, with more mixed-use development at lower densities being promoted in surrounding neighborhoods. Residential and employment growth is expected to increase only slightly in the downtown areas of St. Helena, Yountville and Calistoga. Overall, Napa County, which has about two percent of the region's jobs and two percent of the region's population in 2010, is projected to assume about 1 percent of the Bay Area's total household growth and 1 percent of its employment growth between 2010 and 2040.

### Historic and Projected Population, Napa




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

# Data Tables for Napa County

## NAPA POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 19,455 | 20,250 | 19,330 | 22,150 | 22,390 | 23,005 | 23,830 | 24,910 | 25,280 |
| Calistoga | 5,155 | 5,120 | 5,170 | 4,645 | 4,900 | 5,245 | 5,485 | 5,550 | 5,600 |
| Napa | 76,915 | 79,815 | 77,155 | 74,560 | 77,185 | 79,460 | 82,205 | 85,280 | 86,715 |
| St. Helena | 5,815 | 5,980 | 5,830 | 5,920 | 6,085 | 6,415 | 6,655 | 6,715 | 6,800 |
| Yountville | 2,935 | 2,980 | 2,935 | 2,845 | 2,995 | 3,205 | 3,385 | 3,450 | 3,535 |
| Unincorporated | 26,215 | 26,855 | 25,455 | 26,770 | 27,690 | 28,805 | 29,880 | 29,950 | 30,120 |
| County | 136,485 | 140,990 | 135,880 | 136,885 | 141,240 | 146,130 | 151,445 | 155,860 | 158,050 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## NAPA HOUSEHOLD POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 19,400 | 20,190 | 19,275 | 22,090 | 22,330 | 22,940 | 23,760 | 24,840 | 25,205 |
| Calistoga | 5,100 | 5,065 | 5,115 | 4,585 | 4,835 | 5,180 | 5,415 | 5,480 | 5,520 |
| Napa | 75,680 | 78,575 | 76,175 | 73,520 | 76,085 | 78,300 | 80,975 | 83,970 | 85,330 |
| St. Helena | 5,715 | 5,880 | 5,730 | 5,815 | 5,975 | 6,300 | 6,535 | 6,585 | 6,665 |
| Yountville | 1,945 | 2,010 | 1,950 | 1,800 | 1,890 | 2,035 | 2,150 | 2,145 | 2,155 |
| Unincorporated | 23,730 | 24,300 | 24,185 | 25,420 | 26,265 | 27,295 | 28,285 | 28,275 | 28,350 |
| County | 131,565 | 136,020 | 132,430 | 133,235 | 137,380 | 142,050 | 147,125 | 151,295 | 153,220 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## NAPA HOUSEHOLDS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 5,655 | 5,805 | 5,655 | 5,540 | 5,710 | 5,900 | 6,035 | 6,305 | 6,300 |
| Calistoga | 2,020 | 1,975 | 2,020 | 1,805 | 1,905 | 2,035 | 2,120 | 2,120 | 2,105 |
| Napa | 28,165 | 28,835 | 28,165 | 26,990 | 27,990 | 28,825 | 29,655 | 30,485 | 30,585 |
| St. Helena | 2,400 | 2,435 | 2,400 | 2,425 | 2,490 | 2,620 | 2,705 | 2,700 | 2,695 |
| Yountville | 1,050 | 1,070 | 1,050 | 965 | 1,010 | 1,080 | 1,130 | 1,115 | 1,105 |
| Unincorporated | 9,585 | 9,675 | 9,585 | 11,020 | 11,260 | 11,615 | 12,060 | 11,940 | 11,835 |
| County | 48,875 | 49,800 | 48,875 | 48,750 | 50,365 | 52,080 | 53,710 | 54,670 | 54,625 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## PERSONS PER HOUSEHOLD

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 3.43 | 3.48 | 3.41 | 3.99 | 3.91 | 3.89 | 3.94 | 3.94 | 4.00 |
| Calistoga | 2.53 | 2.56 | 2.53 | 2.54 | 2.54 | 2.54 | 2.56 | 2.58 | 2.62 |
| Napa | 2.69 | 2.72 | 2.70 | 2.72 | 2.72 | 2.72 | 2.73 | 2.75 | 2.79 |
| St. Helena | 2.38 | 2.41 | 2.39 | 2.40 | 2.40 | 2.40 | 2.42 | 2.44 | 2.47 |
| Yountville | 1.85 | 1.88 | 1.86 | 1.87 | 1.88 | 1.89 | 1.90 | 1.92 | 1.95 |
| Unincorporated | 2.48 | 2.51 | 2.52 | 2.31 | 2.33 | 2.35 | 2.35 | 2.37 | 2.40 |
| County | 2.69 | 2.73 | 2.71 | 2.73 | 2.73 | 2.73 | 2.74 | 2.77 | 2.80 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## NAPA EMPLOYED RESIDENTS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 8,920 | 9,895 | 6,290 | 8,040 | 8,065 | 8,180 | 8,355 | 8,570 | 8,510 |
| Calistoga | 2,595 | 2,615 | 2,535 | 2,515 | 2,570 | 2,655 | 2,670 | 2,605 | 2,540 |
| Napa | 36,980 | 41,565 | 38,810 | 41,395 | 41,920 | 42,145 | 42,505 | 43,070 | 42,530 |
| St. Helena | 2,810 | 2,855 | 3,195 | 3,570 | 3,590 | 3,675 | 3,695 | 3,615 | 3,570 |
| Yountville | 1,080 | 1,170 | 1,075 | 1,150 | 1,170 | 1,215 | 1,250 | 1,230 | 1,215 |
| Unincorporated | 13,170 | 13,050 | 14,555 | 17,005 | 17,355 | 17,655 | 17,895 | 17,560 | 17,205 |
| County | 65,555 | 71,145 | 66,455 | 73,680 | 74,670 | 75,530 | 76,370 | 76,655 | 75,565 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## NAPA TOTAL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 3,190 | 3,905 | 5,380 | 5,850 | 6,210 | 6,610 | 7,190 | 7,970 | 8,165 |
| Calistoga | 2,360 | 2,610 | 2,225 | 2,235 | 2,260 | 2,275 | 2,300 | 2,340 | 2,360 |
| Napa | 32,395 | 36,270 | 33,920 | 33,220 | 33,670 | 33,995 | 34,950 | 36,995 | 42,910 |
| St. Helena | 8,545 | 6,400 | 5,700 | 5,750 | 5,765 | 5,805 | 5,820 | 5,820 | 5,980 |
| Yountville | 2,820 | 3,140 | 2,770 | 2,810 | 2,820 | 2,820 | 2,820 | 2,820 | 2,825 |
| Unincorporated | 20,405 | 27,915 | 20,685 | 21,005 | 21,185 | 21,075 | 21,180 | 21,310 | 21,110 |
| County | 69,715 | 80,235 | 70,680 | 70,880 | 71,905 | 72,580 | 74,255 | 77,260 | 83,355 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## NAPA AGRICULTURE AND NATURAL RESOURCES JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 5 | 5 | 145 | 150 | 150 | 150 | 150 | 150 | 150 |
| Calistoga | 20 | 0 | 65 | 65 | 65 | 65 | 65 | 65 | 65 |
| Napa | 1,320 | 1,545 | 390 | 410 | 405 | 405 | 405 | 400 | 405 |
| St. Helena | 1,680 | 1,130 | 1,025 | 1,015 | 1,015 | 1,015 | 1,010 | 1,010 | 1,010 |
| Yountville | 90 | 85 | 110 | 110 | 110 | 110 | 110 | 105 | 105 |
| Unincorporated | 590 | 950 | 3,205 | 3,190 | 3,165 | 3,135 | 3,110 | 3,085 | 3,060 |
| County | 3,995 | 3,900 | 4,935 | 4,940 | 4,910 | 4,880 | 4,850 | 4,820 | 4,795 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## NAPA MANUFACTURING, WHOLESALE AND TRANSPORTATION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 1,275 | 940 | 1,840 | 1,940 | 2,115 | 2,315 | 2,590 | 3,005 | 3,135 |
| Calistoga | 145 | 145 | 225 | 230 | 230 | 230 | 230 | 235 | 235 |
| Napa | 2,885 | 2,685 | 4,205 | 3,735 | 3,660 | 3,570 | 3,565 | 3,710 | 3,690 |
| St. Helena | 2,735 | 2,010 | 1,365 | 1,365 | 1,360 | 1,360 | 1,355 | 1,350 | 1,355 |
| Yountville | 310 | 325 | 180 | 185 | 185 | 185 | 185 | 180 | 180 |
| Unincorporated | 1,290 | 2,820 | 6,580 | 6,300 | 6,510 | 6,560 | 6,665 | 6,900 | 6,910 |
| County | 9,260 | 9,415 | 14,395 | 13,760 | 14,060 | 14,225 | 14,590 | 15,385 | 15,510 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## NAPA RETAIL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 275 | 645 | 620 | 715 | 710 | 705 | 690 | 705 | 695 |
| Calistoga | 270 | 255 | 145 | 150 | 155 | 155 | 155 | 155 | 155 |
| Napa | 5,415 | 4,745 | 3,670 | 3,920 | 3,990 | 3,920 | 3,855 | 3,870 | 3,820 |
| St. Helena | 770 | 510 | 595 | 680 | 695 | 735 | 755 | 755 | 755 |
| Yountville | 60 | 125 | 45 | 45 | 50 | 50 | 50 | 50 | 50 |
| Unincorporated | 400 | 515 | 1,210 | 2,075 | 2,105 | 2,120 | 2,155 | 2,110 | 2,050 |
| County | 6,980 | 6,515 | 6,280 | 7,590 | 7,705 | 7,685 | 7,660 | 7,640 | 7,520 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## NAPA FINANCIAL AND PROFESSIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 520 | 850 | 695 | 690 | 675 | 645 | 640 | 625 | 595 |
| Calistoga | 175 | 250 | 230 | 235 | 235 | 235 | 235 | 235 | 235 |
| Napa | 4,555 | 5,510 | 5,450 | 5,100 | 4,820 | 4,590 | 4,480 | 4,340 | 7,045 |
| St. Helena | 680 | 525 | 845 | 840 | 840 | 840 | 840 | 840 | 845 |
| Yountville | 60 | 85 | 120 | 140 | 140 | 140 | 140 | 140 | 140 |
| Unincorporated | 1,325 | 1,530 | 2,030 | 1,940 | 1,855 | 1,795 | 1,730 | 1,665 | 1,570 |
| County | 7,315 | 8,750 | 9,370 | 8,945 | 8,560 | 8,245 | 8,065 | 7,845 | 10,430 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## NAPA HEALTH, EDUCATIONAL AND RECREATIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 675 | 790 | 805 | 915 | 1,000 | 1,080 | 1,230 | 1,440 | 1,485 |
| Calistoga | 1,470 | 1,685 | 1,165 | 1,150 | 1,160 | 1,165 | 1,170 | 1,185 | 1,195 |
| Napa | 11,615 | 14,695 | 13,550 | 12,985 | 13,425 | 13,825 | 14,470 | 15,840 | 18,995 |
| St. Helena | 2,070 | 1,860 | 1,310 | 1,285 | 1,285 | 1,285 | 1,285 | 1,290 | 1,380 |
| Yountville | 1,395 | 1,610 | 720 | 725 | 725 | 730 | 730 | 730 | 735 |
| Unincorporated | 16,030 | 20,295 | 4,160 | 3,750 | 3,665 | 3,555 | 3,545 | 3,640 | 3,625 |
| County | 32,140 | 40,375 | 21,710 | 20,805 | 21,265 | 21,635 | 22,430 | 24,125 | 27,415 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## NAPA INFORMATION, GOVERNMENT AND CONSTRUCTION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| American Canyon | 425 | 645 | 1,275 | 1,435 | 1,560 | 1,715 | 1,890 | 2,050 | 2,105 |
| Calistoga | 310 | 275 | 390 | 410 | 415 | 425 | 440 | 465 | 475 |
| Napa | 6,510 | 6,820 | 6,655 | 7,070 | 7,370 | 7,685 | 8,180 | 8,835 | 8,960 |
| St. Helena | 640 | 390 | 565 | 565 | 565 | 565 | 565 | 570 | 635 |
| Yountville | 920 | 930 | 1,595 | 1,610 | 1,610 | 1,610 | 1,610 | 1,615 | 1,615 |
| Unincorporated | 885 | 1,885 | 3,505 | 3,745 | 3,885 | 3,910 | 3,975 | 3,915 | 3,895 |
| County | 10,025 | 11,280 | 13,985 | 14,835 | 15,405 | 15,915 | 16,660 | 17,445 | 17,685 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

mtc.graphics.pb —1.24.2018
Miles
0
5
San Francisco
101
80
1
35
280
Incorporated Place
Daly City
Incorporated Place Name
Subregional Study Area
Alamo
Subregional Study Area Name
Unincorporated Place
Priority Development Area

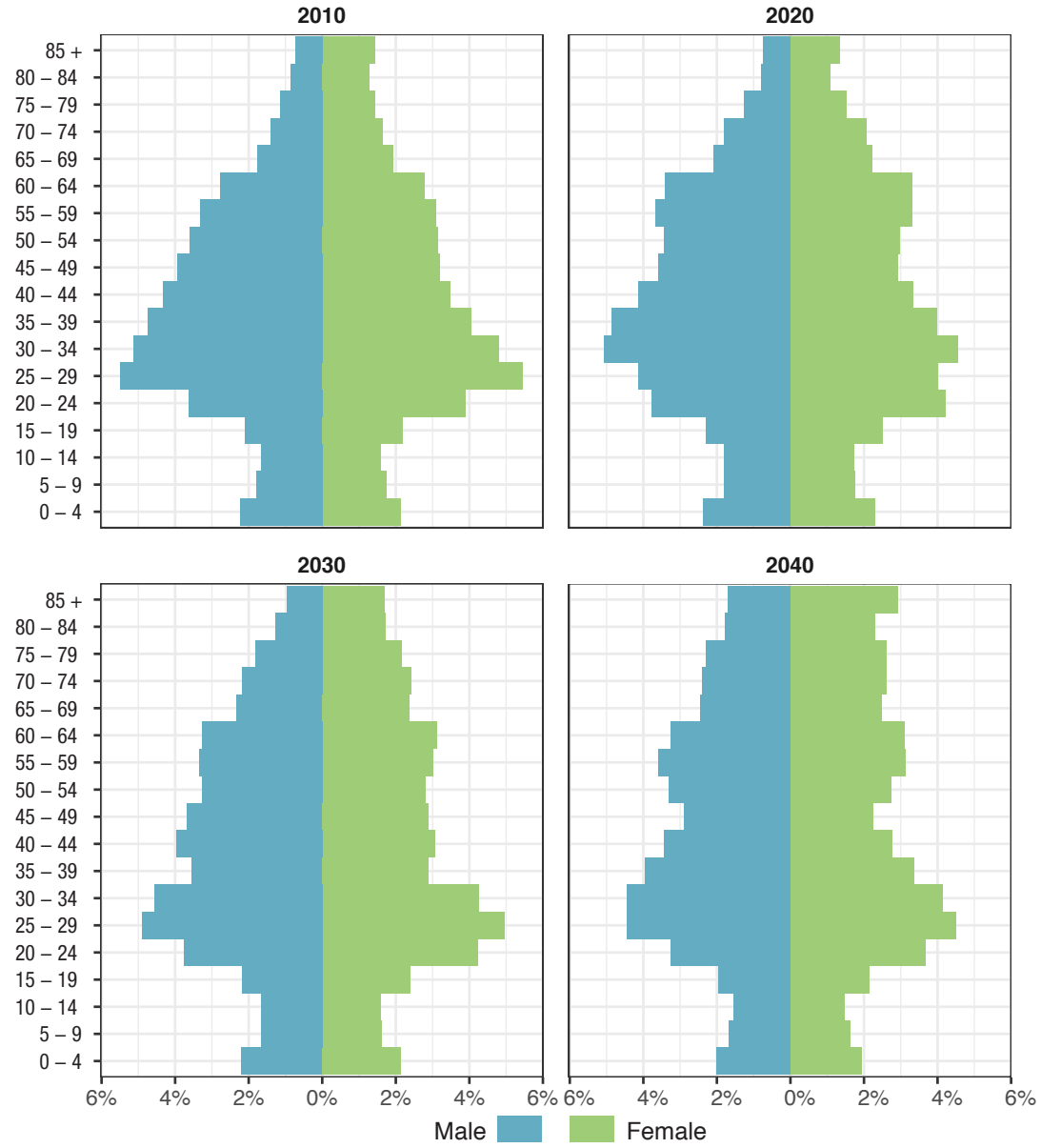
# San Francisco County

## SAN FRANCISCO DATA SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 805,235 | 857,410 | 809,145 | 907,305 | 959,405 | 999,750 | 1,034,175 | 1,085,130 | 1,169,485 |
| Household Population | 779,455 | 832,320 | 785,245 | 882,705 | 933,380 | 972,250 | 1,005,100 | 1,054,385 | 1,136,455 |
| Households | 345,170 | 355,580 | 345,810 | 388,515 | 408,600 | 425,185 | 437,505 | 453,770 | 483,695 |
| Persons per Household | 2.26 | 2.34 | 2.27 | 2.27 | 2.28 | 2.29 | 2.30 | 2.32 | 2.35 |
| Employed Residents | 450,230 | 505,330 | 414,370 | 528,680 | 552,690 | 567,530 | 576,950 | 591,035 | 620,260 |
| Agriculture & Natural Resources | 475 | 390 | 505 | 650 | 640 | 640 | 630 | 630 | 625 |
| Construction | 16,345 | 23,320 | 10,185 | 14,330 | 14,610 | 15,320 | 16,715 | 20,225 | 23,320 |
| Manufacturing & Wholesale | 23,230 | 29,280 | 19,985 | 20,720 | 19,355 | 18,665 | 17,435 | 16,150 | 14,715 |
| Retail | 46,070 | 55,240 | 42,565 | 48,640 | 50,985 | 52,755 | 53,685 | 54,515 | 56,485 |
| Transportation & Utilities | 13,590 | 15,585 | 12,270 | 13,310 | 12,710 | 12,230 | 11,735 | 11,390 | 10,995 |
| Information | 22,655 | 37,050 | 16,290 | 24,575 | 23,620 | 23,690 | 24,400 | 26,075 | 27,015 |
| Financial & Leasing | 59,760 | 61,620 | 55,540 | 84,190 | 90,515 | 91,970 | 90,710 | 89,670 | 86,375 |
| Professional & Managerial Services | 140,290 | 209,965 | 129,190 | 217,590 | 233,525 | 252,155 | 264,770 | 277,085 | 282,200 |
| Health & Educational Services | 70,110 | 98,765 | 90,305 | 106,395 | 119,350 | 131,900 | 137,795 | 143,090 | 148,715 |
| Arts, Recreation & Other Services | 133,370 | 138,470 | 97,895 | 107,765 | 109,005 | 111,435 | 108,745 | 104,750 | 101,205 |
| Government | 84,175 | 85,645 | 102,780 | 110,375 | 111,520 | 112,955 | 113,750 | 118,655 | 120,580 |
| Total Jobs | 610,065 | 755,340 | 577,510 | 748,545 | 785,835 | 823,725 | 840,375 | 862,230 | 872,230 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## Projected Age Distribution, San Francisco




Source: ABAG / MTC Plan Bay Area data

## COUNTY OVERVIEW

The City and County of San Francisco is one of California's largest cities and home to many of the region's historical landmarks. Like many port cities, the convergence of cultures in one location has resulted in a diverse population. San Francisco saw its post-war population peak in 1950 at 775,000, a high water mark not surpassed until the passing of a new century, in early 2000. Since 2010, the city saw the highest growth rates since that mid-century peak, signaling some renewed enthusiasm for living in the historic center of the region.

As one of the region's largest employment hubs, San Francisco brings in nearly 350,000 commuters each day from outside the county. Accommodating commuters, residents, and visitors, San Francisco has an extensive public transit system that integrates MUNI, BART, Caltrain, bus and ferry service from surrounding counties among others. The Central Subway will add a cross-Market Street spur to the existing subway system, considerably improving overall network connectivity. The Salesforce Transirt Center is slated to open in 2018, with plans for connecting 11 transit systems and promising a stronger integration of regional transit carrying passengers not just *to*, but increasingly *from* the city to jobs elsewhere.

## POPULATION

San Francisco's population was 805,000 in 2010, and has since then climbed to nearly 875,000.[9] Modest housing growth levels characterized the development landscape for several recent

decades as the city was more focused on office than housing development. This changed gear as the city for the past dozen years has undertaken a thorough review of the balance between the need for housing and industrial space, considerably increasing the capacity for housing in its transit-rich neighborhoods. Accordingly, by 2040, the population of San Francisco is projected to grow by 44 percent (358,000 residents), reaching close to 1.17 million people and adding 138,000 households, representing a 40 percent increase over 2010 levels. Such levels are made possible in part by a handful of large scale, unique development opportunities, including Treasure Island, the Hunters Point Shipyard / Candlestick, and Parkmerced projects, adding more than 25,000 units to the housing stock.

## ECONOMY

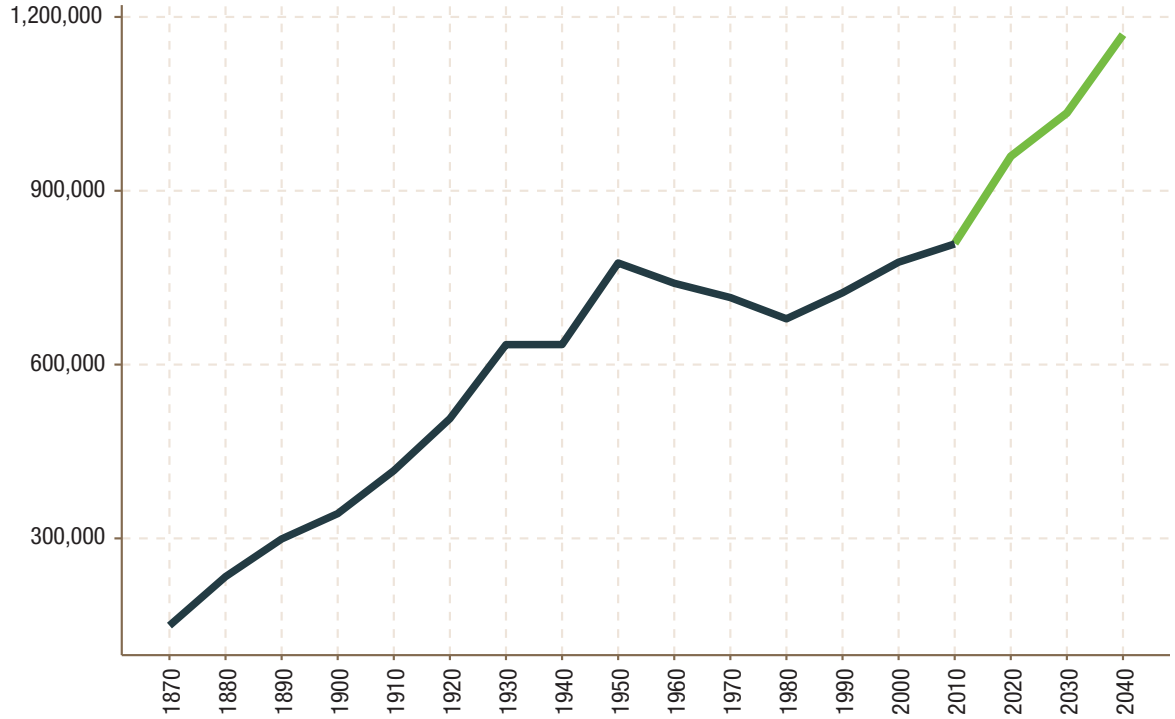
San Francisco, long surpassed by San José in terms of population, remains by far the largest employment center in the region, a major cultural center, as well as a premier tourist destination in North America. In recent years San Francisco has also become a location of choice for emerging social media and cloud-based technology service companies, from Twitter to Salesforce and Dropbox, just as it has become a major center for the emerging sharing economy particularly in the transportation and housing sectors.

Financial services, while less dominant than in earlier decades, retain a strong position in the city. Similarly, the Arts, Recreation, and Other Services (capturing much of the tourism-oriented industries) accounts for 17 percent of San Francisco's jobs, 3 percentage points higher than the regional share. The largest share of the county's employment is in Professional and Managerial Services (22 percent).

Between 2010 and 2040, San Francisco's employment base is expected to increase by 51 percent, or 295,000 jobs. Because of the strong recovery from the Great Recession, half of that employment growth had already taken place by 2015.

The existing concentration of jobs and transit makes the city a key location to focus growth, yet this presents infrastructural challenges. From 2010 to 2040, San Francisco is estimated to absorb 17 percent of the region's total household growth and 23 percent of total job growth. This growth will cluster in the 12 PDAs with adopted plans on the eastern side of the city, as well as in downtown and along future Bus Rapid Transit (BRT) lines on Van Ness Avenue and Geary Boulevard.

### Historic and Projected Population, San Francisco




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

# Data Tables for San Francisco County

## SAN FRANCISCO POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 805,235 | 857,410 | 809,145 | 907,305 | 959,405 | 999,750 | 1,034,175 | 1,085,130 | 1,169,485 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SAN FRANCISCO HOUSEHOLD POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 779,455 | 832,320 | 785,245 | 882,705 | 933,380 | 972,250 | 1,005,100 | 1,054,385 | 1,136,455 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SAN FRANCISCO HOUSEHOLDS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 345,170 | 355,580 | 345,810 | 388,515 | 408,600 | 425,185 | 437,505 | 453,770 | 483,695 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SAN FRANCISCO PERSONS PER HOUSEHOLD

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 2.26 | 2.34 | 2.27 | 2.27 | 2.28 | 2.29 | 2.30 | 2.32 | 2.35 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SAN FRANCISCO EMPLOYED RESIDENTS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 450,230 | 505,330 | 414,370 | 528,680 | 552,690 | 567,530 | 576,950 | 591,035 | 620,260 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## SAN FRANCISCO TOTAL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 610,065 | 755,340 | 576,850 | 748,230 | 785,530 | 823,505 | 840,270 | 862,315 | 872,510 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN FRANCISCO AGRICULTURE AND NATURAL RESOURCES JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 475 | 390 | 505 | 650 | 640 | 640 | 630 | 630 | 625 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN FRANCISCO MANUFACTURING, WHOLESALE AND TRANSPORTATION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 36,820 | 44,865 | 32,155 | 33,895 | 31,920 | 30,760 | 29,030 | 27,385 | 25,535 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN FRANCISCO RETAIL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 46,070 | 55,240 | 42,565 | 48,640 | 50,985 | 52,755 | 53,685 | 54,515 | 56,485 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN FRANCISCO FINANCIAL AND PROFESSIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 200,050 | 271,585 | 184,870 | 302,070 | 324,360 | 344,500 | 355,895 | 367,220 | 369,060 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN FRANCISCO HEALTH, EDUCATIONAL AND RECREATIONAL SERVICE JOBS

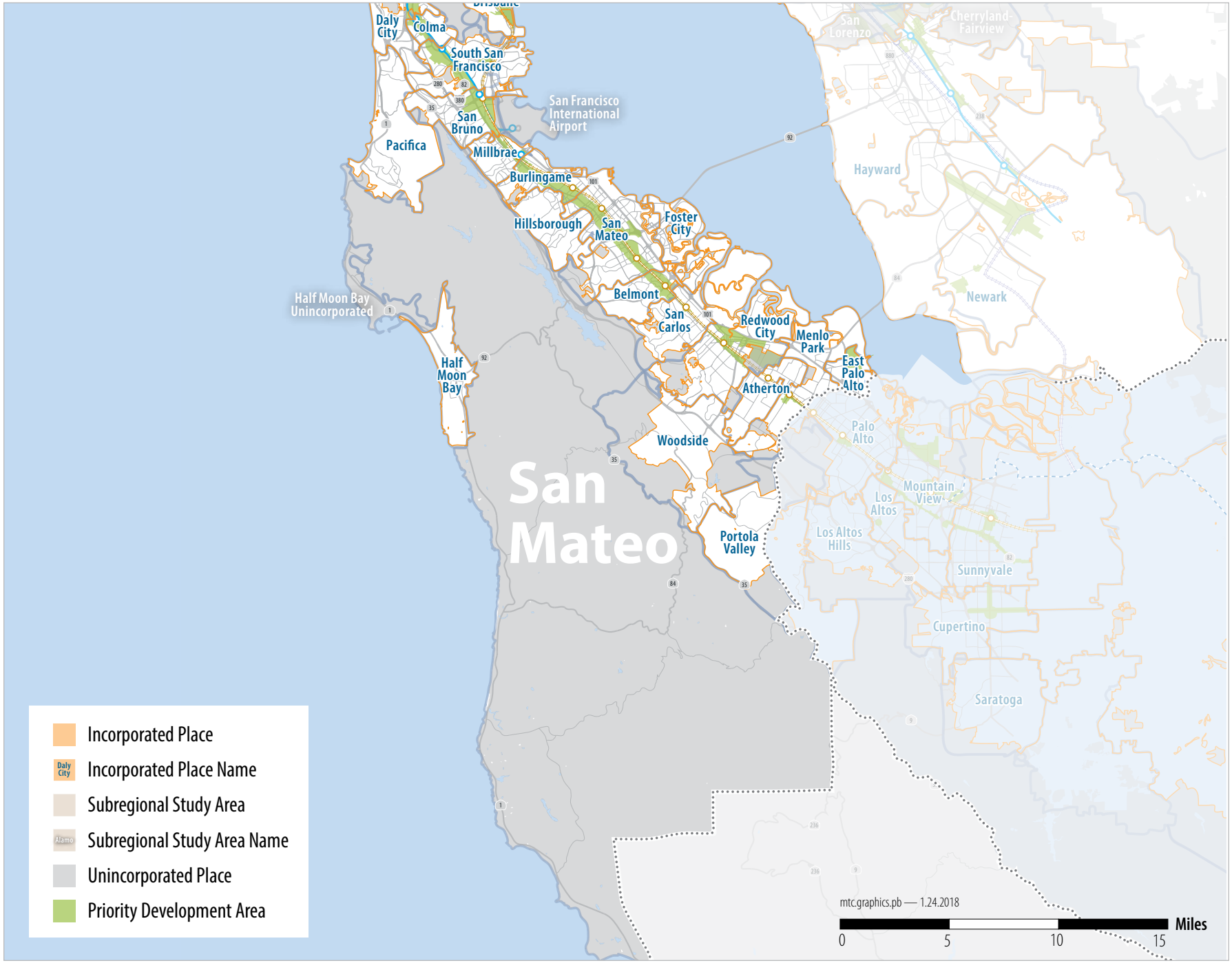
| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 203,480 | 237,240 | 188,195 | 214,155 | 228,350 | 243,335 | 246,540 | 247,835 | 249,920 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN FRANCISCO INFORMATION, GOVERNMENT AND CONSTRUCTION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| San Francisco | 123,180 | 146,015 | 128,560 | 148,825 | 149,275 | 151,515 | 154,490 | 164,730 | 170,885 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.


Daly City
Colma
South San Francisco
San Bruno
San Francisco International Airport
Pacifica
Millbrae
Burlingame
Hillsborough
San Mateo
Foster City
Belmont
San Carlos
Redwood City
Menlo Park
East Palo Alto
Atherton
Half Moon Bay Unincorporated
Half Moon Bay
Woodside
Portola Valley
San Mateo
San Lorenzo
Cherryland-Fairview
Hayward
Newark
Palo Alto
Mountain View
Los Altos
Los Altos Hills
Sunnyvale
Cupertino
Saratoga
Incorporated Place
Daly City
Incorporated Place Name
Subregional Study Area
Alamo
Subregional Study Area Name
Unincorporated Place
Priority Development Area
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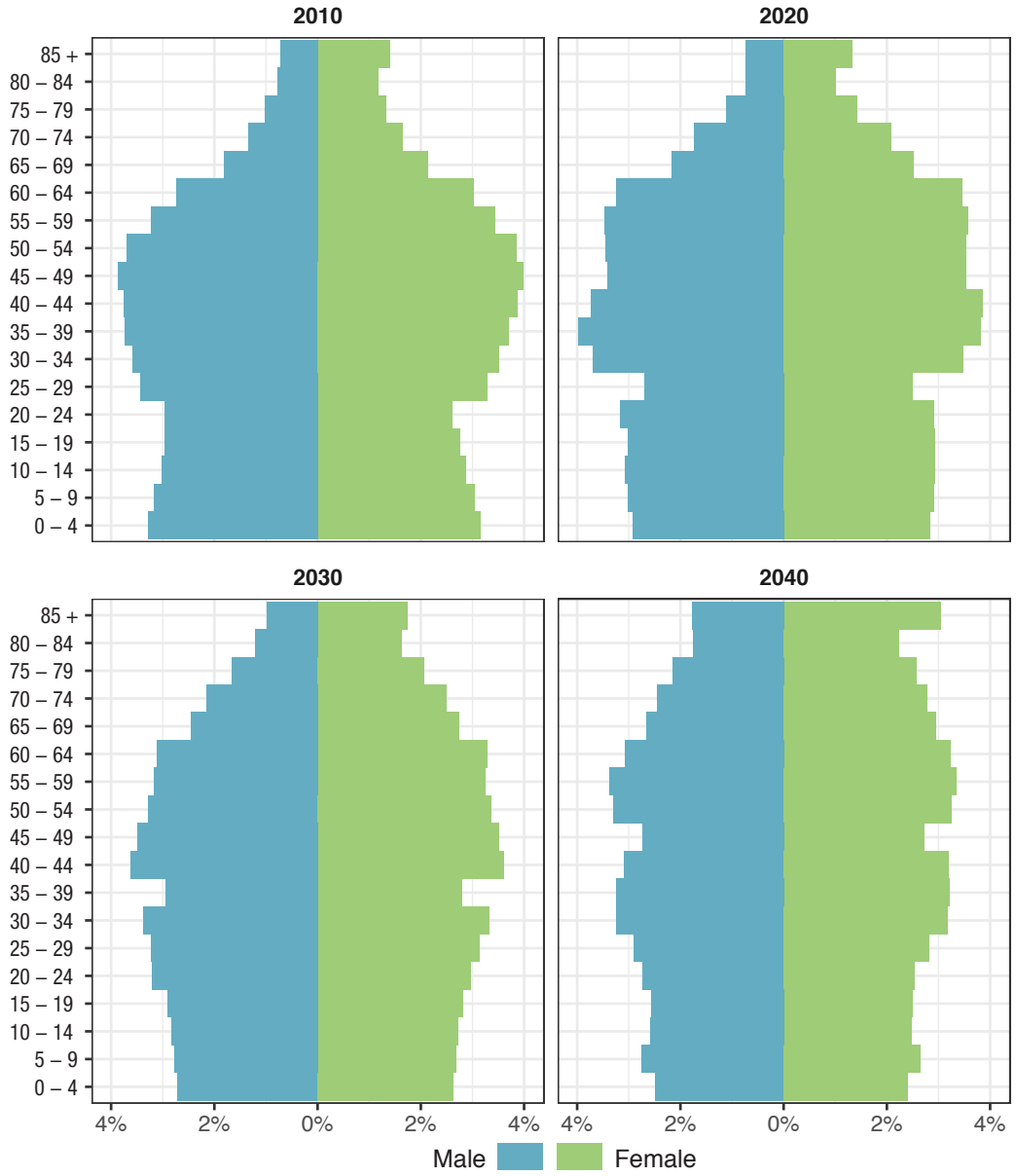
# San Mateo County

## SAN MATEO DATA SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 718,450 | 759,610 | 721,195 | 757,895 | 796,925 | 816,460 | 853,260 | 878,020 | 916,590 |
| Household Population | 709,600 | 750,115 | 712,200 | 748,400 | 786,875 | 805,875 | 842,060 | 866,210 | 904,125 |
| Households | 257,835 | 260,110 | 257,835 | 270,715 | 284,260 | 290,330 | 302,520 | 308,410 | 317,965 |
| Persons per Household | 2.75 | 2.88 | 2.76 | 2.76 | 2.77 | 2.78 | 2.78 | 2.81 | 2.84 |
| Employed Residents | 367,940 | 405,185 | 332,760 | 396,885 | 415,275 | 420,235 | 433,655 | 437,190 | 446,040 |
| Agriculture & Natural Resources | 1,625 | 1,440 | 2,300 | 2,475 | 2,460 | 2,455 | 2,450 | 2,435 | 2,440 |
| Construction | 18,645 | 26,860 | 14,200 | 17,560 | 18,490 | 19,295 | 20,360 | 23,635 | 27,340 |
| Manufacturing & Wholesale | 43,190 | 44,120 | 37,985 | 34,025 | 32,230 | 30,895 | 29,145 | 27,535 | 26,135 |
| Retail | 37,585 | 38,055 | 34,625 | 36,515 | 37,530 | 38,120 | 39,220 | 39,420 | 39,675 |
| Transportation & Utilities | 21,490 | 26,005 | 25,960 | 24,565 | 23,905 | 22,975 | 22,385 | 22,225 | 22,565 |
| Information | 18,565 | 30,710 | 14,500 | 19,195 | 18,735 | 18,420 | 18,055 | 18,375 | 18,490 |
| Financial & Leasing | 19,920 | 22,415 | 23,980 | 29,800 | 30,900 | 31,590 | 30,920 | 30,355 | 32,540 |
| Professional & Managerial Services | 65,715 | 84,560 | 67,660 | 94,750 | 99,420 | 109,115 | 114,640 | 120,790 | 137,020 |
| Health & Educational Services | 39,915 | 49,235 | 44,010 | 48,640 | 54,470 | 59,500 | 63,105 | 67,960 | 77,740 |
| Arts, Recreation & Other Services | 53,975 | 62,960 | 46,690 | 48,200 | 49,705 | 51,195 | 51,785 | 52,450 | 56,660 |
| Government | 27,245 | 31,190 | 31,465 | 30,170 | 31,570 | 31,880 | 31,090 | 31,235 | 31,740 |
| Total Jobs | 347,860 | 417,550 | 343,380 | 385,900 | 399,415 | 415,430 | 423,160 | 436,420 | 472,340 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## Projected Age Distribution, San Mateo




Source: ABAG / MTC Plan Bay Area data

## COUNTY OVERVIEW

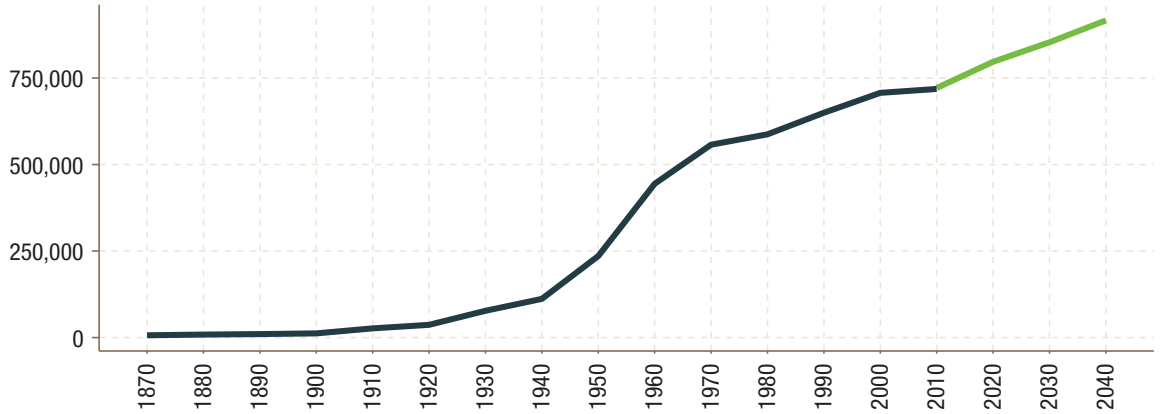
San Mateo County is the Bay Area county with the second smallest land area, after San Francisco. One-third of the county's acreage is protected open space. The Coast Range divides San Mateo County into two distinct parts: coastal and bayside. Two cities, Half Moon Bay and Pacifica, are entirely in the coastal area, which is primarily agricultural but has seen some recreational, residential and office development in recent years.

Over ninety percent of San Mateo County's urban development is on the bayside, in 18 of the county's jurisdictions, many of which were developed first as a series of "railroad" bedroom communities for San Francisco. Caltrain service, BART, and the highway system reinforce this travel route through the Peninsula, which is now as important for employers within the county as for a commuting workforce that come from and goes to counties throughout the region. The bayshore travel corridor has influenced city form and development patterns. As employment activity and household growth intensifies along the 101 corridor through San Mateo County, several modes of transit are being considered for expansion to Peninsula job clusters and residential nodes, including high speed rail, bus rapid transit and ferry service.

## POPULATION

San Mateo County's population was just over 720,000 in 2010, showing very little change from 2000, but is estimated to have jumped in size to 757,000 by 2015. It is projected to grow by an additional 150,000 residents between 2015 and 2040. The number of households grew by about 13,000 between 2010 and 2015 and could increase further by 48,000 by 2040.

### Historic and Projected Population, San Mateo




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

The largest growth in households (and population) is projected to occur in two of the three largest cities—Redwood City and South San Francisco, each of which would add more than 10,000 households between 2010 and 2040. Menlo Park, consistent with its growth as a job center is projected to see an increase of over 5,000 households, while growth of more than 3,000 households is projected for some of the cities with BART station development opportunities

## ECONOMY

San Mateo County's economic base has transformed as the region's economy has grown and changed. San Francisco International Airport (SFO), located in San Mateo County, continues to be a dominant economic force and a major hub for United Airlines. Nearly 56 million passengers passed through SFO in 2017. Financial firms were among the first to bring large scale employment opportunities to the resident labor force in the San Mateo County suburbs. Although the Bay Area's prominence as a national financial center has weakened in recent decades, Visa, Franklin Templeton Investments and Fisher Investments remain among the county's larger employers. Biotechnology and medical device companies are an important part of the economic picture. Biotechnology giant Genentech, headquartered in South San Francisco, leads the biotechnology and medical device sector in San Mateo County.

Technology and social media sectors have been critical forces of change to the county's economy and level of urbanization. In the past two decades San Mateo County has acted as the bridge that extends Silicon Valley from Santa Clara County to San Francisco and beyond. Software company Oracle, headquartered in Redwood Shores led the establishment of software firms in San Mateo County. Electronic Arts, the video game company, is another large employer located in Redwood Shores. The Facebook campus in Menlo Park has further expanded the county's already diverse employment base. Employment is projected to grow by 37 percent or 128,700 new jobs in the county, from 343,300 to 472,300. About 40 percent of the county's job growth projected for that period is already estimated to have occurred by 2015. Redwood City is expected to increase its job counts by almost 50 percent, or 21 percent of the total job growth of the county, followed by the cities of San Mateo and South San Francisco, each of which is expected to add 13 percent and 12 percent of the projected county-wide growth. Brisbane is likely to experience dramatic changes, with a projected increase in jobs by over 200 percent over the next thirty years.

San Mateo County is forecast to absorb seven percent of Bay Area population and household growth, and 10 percent of the region's employment growth between 2010 and 2040. Looking forward, while the aging of the population and moderating pace of employment growth will lower the Bay Area's jobs to household ratio to a more traditional 1.37 by 2040, San Mateo County is projected to continue as a leader in job growth, with this ratio rising slightly to 1.48. With the transformation of the El Camino and highway 101 corridor from bedroom community to a string of employment centers, growth is expected to be concentrated in the 22 PDAs along this corridor (six out of 10 new households), taking advantage of the existing and planned transportation infrastructure to create new housing and employment opportunities in this centrally located county.

# Data Tables for San Mateo County

## SAN MATEO POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 6,915 | 7,085 | 6,925 | 7,345 | 7,390 | 7,435 | 7,525 | 7,590 | 7,685 |
| Belmont | 25,835 | 27,460 | 26,215 | 27,155 | 27,405 | 27,685 | 27,970 | 29,145 | 30,085 |
| Brisbane | 4,280 | 4,600 | 4,365 | 4,400 | 15,235 | 14,790 | 15,145 | 15,290 | 16,050 |
| Burlingame | 28,805 | 29,725 | 28,925 | 29,455 | 29,975 | 31,050 | 31,805 | 32,495 | 33,145 |
| Colma | 1,455 | 1,500 | 1,485 | 2,305 | 2,385 | 2,500 | 2,545 | 2,690 | 2,485 |
| Daly City | 101,070 | 107,985 | 101,275 | 102,730 | 110,430 | 111,830 | 113,680 | 115,015 | 121,330 |
| East Palo Alto | 28,155 | 30,070 | 28,215 | 29,900 | 30,675 | 30,970 | 31,285 | 34,575 | 36,090 |
| Foster City | 30,565 | 32,945 | 30,650 | 32,405 | 33,140 | 33,435 | 34,095 | 35,250 | 39,070 |
| Half Moon Bay | 11,325 | 12,145 | 11,785 | 12,970 | 13,040 | 13,205 | 13,345 | 13,385 | 13,440 |
| Hillsborough | 10,825 | 11,565 | 10,845 | 11,420 | 11,475 | 11,530 | 11,610 | 11,735 | 11,850 |
| Menlo Park | 32,025 | 33,670 | 32,225 | 37,945 | 44,530 | 48,490 | 52,865 | 53,455 | 54,920 |
| Millbrae | 21,530 | 23,055 | 21,610 | 22,025 | 22,360 | 22,640 | 26,745 | 26,610 | 27,055 |
| Pacifica | 37,235 | 38,035 | 37,375 | 37,440 | 37,980 | 38,435 | 39,025 | 39,245 | 40,145 |
| Portola Valley | 4,355 | 4,665 | 4,400 | 4,600 | 4,590 | 4,610 | 4,640 | 4,675 | 4,730 |
| Redwood City | 76,815 | 83,755 | 77,485 | 82,870 | 83,995 | 85,340 | 90,995 | 96,420 | 103,940 |
| San Bruno | 41,115 | 45,060 | 41,240 | 41,270 | 41,895 | 43,100 | 44,330 | 47,080 | 51,920 |
| San Carlos | 28,405 | 29,145 | 28,520 | 32,895 | 33,205 | 33,580 | 33,915 | 34,670 | 35,250 |
| San Mateo | 97,205 | 101,570 | 97,670 | 105,020 | 109,670 | 114,510 | 123,200 | 126,745 | 133,005 |
| South San Francisco | 63,630 | 65,020 | 64,005 | 65,455 | 68,105 | 71,080 | 76,950 | 78,615 | 80,015 |
| Woodside | 5,285 | 5,610 | 5,240 | 5,620 | 5,680 | 5,700 | 5,745 | 5,795 | 5,855 |
| Unincorporated | 61,610 | 64,940 | 60,745 | 62,665 | 63,760 | 64,550 | 65,835 | 67,540 | 68,525 |
| County | 718,450 | 759,610 | 721,195 | 757,895 | 796,925 | 816,460 | 853,260 | 878,020 | 916,590 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities

## SAN MATEO HOUSEHOLD POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 6,530 | 6,700 | 6,545 | 6,945 | 6,965 | 6,985 | 7,050 | 7,085 | 7,155 |
| Belmont | 25,320 | 26,945 | 25,730 | 26,650 | 26,865 | 27,115 | 27,365 | 28,505 | 29,410 |
| Brisbane | 4,265 | 4,585 | 4,350 | 4,385 | 15,220 | 14,770 | 15,125 | 15,270 | 16,030 |
| Burlingame | 28,355 | 29,275 | 28,545 | 29,050 | 29,545 | 30,595 | 31,325 | 31,985 | 32,605 |
| Colma | 1,425 | 1,490 | 1,460 | 2,280 | 2,360 | 2,470 | 2,515 | 2,660 | 2,465 |
| Daly City | 100,390 | 107,300 | 100,585 | 102,000 | 109,655 | 111,010 | 112,815 | 114,100 | 120,345 |
| East Palo Alto | 28,000 | 29,920 | 28,050 | 29,720 | 30,485 | 30,805 | 31,115 | 34,390 | 35,890 |
| Foster City | 30,460 | 32,840 | 30,540 | 32,290 | 33,020 | 33,310 | 33,960 | 35,105 | 38,915 |
| Half Moon Bay | 11,305 | 12,130 | 11,695 | 12,875 | 12,940 | 13,100 | 13,235 | 13,265 | 13,310 |
| Hillsborough | 10,825 | 11,565 | 10,840 | 11,415 | 11,470 | 11,525 | 11,605 | 11,730 | 11,845 |
| Menlo Park | 31,180 | 32,880 | 31,735 | 37,390 | 43,940 | 47,830 | 52,165 | 52,725 | 54,145 |
| Millbrae | 21,215 | 22,740 | 21,290 | 21,685 | 22,000 | 22,265 | 26,345 | 26,185 | 26,605 |
| Pacifica | 37,050 | 37,855 | 37,190 | 37,245 | 37,775 | 38,220 | 38,795 | 39,005 | 39,890 |
| Portola Valley | 4,310 | 4,625 | 4,365 | 4,570 | 4,555 | 4,570 | 4,600 | 4,630 | 4,685 |
| Redwood City | 75,270 | 82,185 | 75,825 | 81,120 | 82,150 | 83,425 | 88,975 | 94,315 | 101,725 |
| San Bruno | 40,715 | 44,660 | 40,845 | 40,855 | 41,455 | 42,630 | 43,835 | 46,560 | 51,370 |
| San Carlos | 28,315 | 29,055 | 28,295 | 32,660 | 32,955 | 33,315 | 33,635 | 34,380 | 34,940 |
| San Mateo | 95,890 | 100,250 | 96,330 | 103,600 | 108,175 | 112,920 | 121,520 | 124,940 | 131,100 |
| South San Francisco | 63,055 | 64,445 | 63,405 | 64,825 | 67,435 | 70,370 | 76,200 | 77,820 | 79,175 |
| Woodside | 5,285 | 5,610 | 5,240 | 5,615 | 5,675 | 5,695 | 5,740 | 5,790 | 5,850 |
| Unincorporated | 60,430 | 63,065 | 59,340 | 61,225 | 62,235 | 62,945 | 64,135 | 65,770 | 66,665 |
| County | 709,600 | 750,115 | 712,200 | 748,400 | 786,875 | 805,875 | 842,060 | 866,210 | 904,125 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities

## SAN MATEO HOUSEHOLDS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 2,330 | 2,280 | 2,330 | 2,455 | 2,470 | 2,475 | 2,485 | 2,470 | 2,460 |
| Belmont | 10,575 | 10,745 | 10,575 | 10,805 | 10,910 | 10,995 | 11,040 | 11,410 | 11,620 |
| Brisbane | 1,820 | 1,870 | 1,820 | 1,835 | 6,360 | 6,160 | 6,285 | 6,275 | 6,410 |
| Burlingame | 12,360 | 12,185 | 12,360 | 12,525 | 12,755 | 13,190 | 13,480 | 13,655 | 13,735 |
| Colma | 430 | 430 | 410 | 795 | 835 | 880 | 895 | 935 | 940 |
| Daly City | 31,080 | 31,715 | 31,090 | 31,275 | 33,615 | 34,005 | 34,390 | 34,415 | 35,775 |
| East Palo Alto | 6,940 | 7,080 | 6,940 | 7,430 | 7,610 | 7,690 | 7,750 | 8,420 | 8,675 |
| Foster City | 12,015 | 12,365 | 12,015 | 12,725 | 13,055 | 13,155 | 13,355 | 13,690 | 15,110 |
| Half Moon Bay | 4,150 | 4,250 | 4,150 | 4,575 | 4,590 | 4,640 | 4,675 | 4,630 | 4,585 |
| Hillsborough | 3,695 | 3,765 | 3,695 | 3,875 | 3,895 | 3,915 | 3,925 | 3,930 | 3,910 |
| Menlo Park | 12,345 | 12,430 | 12,345 | 13,830 | 15,390 | 16,215 | 17,265 | 17,335 | 17,680 |
| Millbrae | 7,995 | 8,180 | 7,995 | 8,110 | 8,235 | 8,325 | 9,865 | 9,705 | 9,725 |
| Pacifica | 13,965 | 13,625 | 13,965 | 13,925 | 14,155 | 14,305 | 14,450 | 14,380 | 14,520 |
| Portola Valley | 1,745 | 1,790 | 1,745 | 1,800 | 1,800 | 1,800 | 1,810 | 1,805 | 1,800 |
| Redwood City | 27,955 | 29,145 | 27,955 | 30,410 | 30,820 | 31,280 | 33,740 | 35,690 | 38,085 |
| San Bruno | 14,700 | 15,395 | 14,700 | 14,645 | 14,890 | 15,240 | 15,570 | 16,505 | 17,935 |
| San Carlos | 11,525 | 11,290 | 11,525 | 13,445 | 13,575 | 13,720 | 13,800 | 13,955 | 13,985 |
| San Mateo | 38,235 | 38,160 | 38,235 | 41,175 | 43,035 | 44,945 | 48,180 | 49,165 | 50,830 |
| South San Francisco | 20,940 | 20,430 | 20,940 | 21,330 | 22,155 | 23,050 | 24,950 | 25,185 | 25,305 |
| Woodside | 1,975 | 2,005 | 1,975 | 2,110 | 2,130 | 2,130 | 2,145 | 2,135 | 2,125 |
| Unincorporated | 21,060 | 20,980 | 21,065 | 21,645 | 21,980 | 22,205 | 22,465 | 22,730 | 22,755 |
| County | 257,835 | 260,110 | 257,835 | 270,715 | 284,260 | 290,330 | 302,520 | 308,410 | 317,965 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SAN MATEO PERSONS PER HOUSEHOLD

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 2.80 | 2.94 | 2.81 | 2.83 | 2.82 | 2.83 | 2.84 | 2.87 | 2.91 |
| Belmont | 2.39 | 2.51 | 2.43 | 2.47 | 2.46 | 2.47 | 2.48 | 2.50 | 2.53 |
| Brisbane | 2.34 | 2.45 | 2.39 | 2.39 | 2.39 | 2.40 | 2.41 | 2.43 | 2.50 |
| Burlingame | 2.29 | 2.40 | 2.31 | 2.32 | 2.32 | 2.32 | 2.32 | 2.34 | 2.37 |
| Colma | 3.31 | 3.47 | 3.55 | 2.86 | 2.82 | 2.81 | 2.82 | 2.85 | 2.62 |
| Daly City | 3.23 | 3.38 | 3.24 | 3.26 | 3.26 | 3.26 | 3.28 | 3.32 | 3.36 |
| East Palo Alto | 4.03 | 4.23 | 4.04 | 4.00 | 4.01 | 4.01 | 4.01 | 4.08 | 4.14 |
| Foster City | 2.53 | 2.66 | 2.54 | 2.54 | 2.53 | 2.53 | 2.54 | 2.56 | 2.58 |
| Half Moon Bay | 2.72 | 2.85 | 2.82 | 2.82 | 2.82 | 2.82 | 2.83 | 2.87 | 2.90 |
| Hillsborough | 2.93 | 3.07 | 2.94 | 2.95 | 2.94 | 2.95 | 2.96 | 2.99 | 3.03 |
| Menlo Park | 2.53 | 2.65 | 2.57 | 2.70 | 2.86 | 2.95 | 3.02 | 3.04 | 3.06 |
| Millbrae | 2.65 | 2.78 | 2.66 | 2.67 | 2.67 | 2.67 | 2.67 | 2.70 | 2.74 |
| Pacifica | 2.65 | 2.78 | 2.66 | 2.67 | 2.67 | 2.67 | 2.68 | 2.71 | 2.75 |
| Portola Valley | 2.47 | 2.59 | 2.50 | 2.54 | 2.53 | 2.54 | 2.54 | 2.57 | 2.61 |
| Redwood City | 2.69 | 2.82 | 2.71 | 2.67 | 2.67 | 2.67 | 2.64 | 2.64 | 2.67 |
| San Bruno | 2.77 | 2.90 | 2.78 | 2.79 | 2.78 | 2.80 | 2.82 | 2.82 | 2.86 |
| San Carlos | 2.46 | 2.57 | 2.46 | 2.43 | 2.43 | 2.43 | 2.44 | 2.46 | 2.50 |
| San Mateo | 2.51 | 2.63 | 2.52 | 2.52 | 2.51 | 2.51 | 2.52 | 2.54 | 2.58 |
| South San Francisco | 3.01 | 3.15 | 3.03 | 3.04 | 3.04 | 3.05 | 3.05 | 3.09 | 3.13 |
| Woodside | 2.67 | 2.80 | 2.65 | 2.66 | 2.67 | 2.67 | 2.68 | 2.71 | 2.75 |
| Unincorporated | 2.87 | 3.01 | 2.82 | 2.83 | 2.83 | 2.83 | 2.85 | 2.89 | 2.93 |
| County | 2.75 | 2.88 | 2.76 | 2.76 | 2.77 | 2.78 | 2.78 | 2.81 | 2.84 |

Source: Calculated from Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SAN MATEO EMPLOYED RESIDENTS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 2,370 | 2,850 | 2,775 | 3,805 | 3,885 | 3,960 | 4,045 | 4,065 | 4,065 |
| Belmont | 13,540 | 13,780 | 13,340 | 15,935 | 16,025 | 16,130 | 16,185 | 16,515 | 16,670 |
| Brisbane | 2,430 | 2,615 | 2,170 | 2,490 | 8,655 | 8,315 | 8,340 | 8,195 | 8,255 |
| Burlingame | 14,965 | 16,035 | 12,735 | 14,660 | 14,820 | 15,105 | 15,380 | 15,440 | 15,360 |
| Colma | 1,035 | 845 | 690 | 1,175 | 1,185 | 1,215 | 1,225 | 1,225 | 1,130 |
| Daly City | 52,610 | 58,090 | 48,375 | 54,785 | 58,245 | 58,190 | 58,300 | 57,630 | 59,260 |
| East Palo Alto | 12,515 | 15,380 | 10,360 | 12,080 | 12,225 | 12,195 | 12,190 | 13,110 | 13,395 |
| Foster City | 15,685 | 17,310 | 15,285 | 18,745 | 19,245 | 19,345 | 19,630 | 19,985 | 21,910 |
| Half Moon Bay | 5,825 | 7,030 | 5,365 | 6,780 | 6,795 | 6,810 | 6,820 | 6,745 | 6,625 |
| Hillsborough | 4,535 | 4,580 | 4,235 | 5,905 | 6,115 | 6,270 | 6,405 | 6,425 | 6,420 |
| Menlo Park | 16,140 | 16,405 | 14,660 | 19,710 | 22,735 | 24,245 | 26,080 | 25,980 | 26,205 |
| Millbrae | 10,425 | 11,460 | 8,300 | 9,490 | 9,505 | 9,535 | 11,370 | 11,105 | 11,045 |
| Pacifica | 19,720 | 21,825 | 19,630 | 22,025 | 22,090 | 22,070 | 22,170 | 21,860 | 21,865 |
| Portola Valley | 1,555 | 1,930 | 1,955 | 2,610 | 2,655 | 2,715 | 2,765 | 2,765 | 2,775 |
| Redwood City | 39,105 | 46,130 | 33,965 | 40,690 | 41,010 | 41,155 | 42,850 | 44,250 | 46,210 |
| San Bruno | 22,670 | 24,310 | 19,935 | 22,215 | 22,310 | 22,425 | 22,640 | 23,560 | 25,335 |
| San Carlos | 14,830 | 15,780 | 14,260 | 19,045 | 19,245 | 19,395 | 19,495 | 19,625 | 19,540 |
| San Mateo | 52,250 | 56,645 | 45,385 | 55,025 | 57,275 | 58,780 | 62,645 | 63,450 | 65,370 |
| South San Francisco | 31,820 | 36,400 | 29,070 | 33,190 | 34,075 | 35,045 | 37,390 | 37,365 | 37,055 |
| Woodside | 2,105 | 2,540 | 2,310 | 3,185 | 3,320 | 3,370 | 3,390 | 3,405 | 3,400 |
| Unincorporated | 31,805 | 33,245 | 27,955 | 33,340 | 33,855 | 33,965 | 34,345 | 34,490 | 34,155 |
| County | 367,940 | 405,185 | 332,760 | 396,885 | 415,275 | 420,235 | 433,655 | 437,190 | 446,040 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## SAN MATEO TOTAL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 2,330 | 2,865 | 2,140 | 2,140 | 2,140 | 2,145 | 2,150 | 2,160 | 2,165 |
| Belmont | 6,775 | 8,200 | 7,925 | 9,210 | 9,240 | 9,300 | 9,425 | 9,430 | 9,430 |
| Brisbane | 7,465 | 6,590 | 5,220 | 5,445 | 6,590 | 12,755 | 13,855 | 14,785 | 16,870 |
| Burlingame | 37,935 | 43,085 | 28,015 | 32,365 | 32,335 | 32,465 | 32,990 | 37,320 | 42,625 |
| Colma | 4,135 | 4,245 | 3,935 | 4,065 | 4,070 | 4,150 | 4,195 | 4,270 | 4,315 |
| Daly City | 20,185 | 20,250 | 18,425 | 18,755 | 18,370 | 18,400 | 18,580 | 19,180 | 22,480 |
| East Palo Alto | 4,345 | 4,340 | 5,125 | 5,185 | 5,810 | 6,080 | 6,295 | 6,400 | 6,660 |
| Foster City | 20,250 | 21,345 | 15,795 | 20,315 | 23,700 | 25,220 | 25,665 | 25,975 | 27,250 |
| Half Moon Bay | 5,445 | 5,625 | 4,915 | 5,250 | 5,290 | 5,310 | 5,330 | 5,355 | 5,375 |
| Hillsborough | 1,730 | 2,430 | 2,120 | 2,205 | 2,210 | 2,220 | 2,225 | 2,250 | 2,265 |
| Menlo Park | 25,150 | 41,420 | 34,625 | 35,105 | 36,410 | 36,970 | 37,195 | 37,775 | 42,475 |
| Millbrae | 5,490 | 6,425 | 5,920 | 6,470 | 6,570 | 6,630 | 6,730 | 7,385 | 11,595 |
| Pacifica | 5,420 | 5,595 | 5,925 | 6,080 | 6,160 | 6,205 | 6,245 | 6,335 | 7,115 |
| Portola Valley | 1,290 | 1,470 | 1,500 | 1,520 | 1,520 | 1,520 | 1,520 | 1,520 | 1,520 |
| Redwood City | 48,575 | 65,490 | 59,290 | 69,460 | 71,050 | 72,125 | 73,015 | 75,500 | 86,720 |
| San Bruno | 13,180 | 15,665 | 12,885 | 14,605 | 14,645 | 14,685 | 14,905 | 14,535 | 14,780 |
| San Carlos | 15,275 | 17,350 | 16,300 | 17,825 | 17,800 | 17,995 | 18,300 | 18,530 | 19,135 |
| San Mateo | 44,955 | 64,120 | 50,975 | 60,305 | 62,570 | 64,515 | 66,510 | 68,750 | 68,010 |
| South San Francisco | 47,665 | 52,645 | 38,720 | 43,000 | 46,365 | 50,075 | 51,000 | 51,730 | 54,230 |
| Woodside | 1,965 | 2,585 | 1,965 | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 | 1,995 |
| Unincorporated | 28,310 | 25,825 | 21,615 | 24,465 | 24,430 | 24,535 | 24,865 | 25,015 | 25,045 |
| County | 347,860 | 417,550 | 343,335 | 385,770 | 399,275 | 415,305 | 423,005 | 436,205 | 472,045 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN MATEO AGRICULTURE AND NATURAL RESOURCES JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 0 | 0 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Belmont | 10 | 0 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Brisbane | 40 | 60 | 5 | 5 | 5 | 5 | 5 | 5 | 10 |
| Burlingame | 0 | 5 | 40 | 65 | 65 | 65 | 65 | 65 | 70 |
| Colma | 65 | 80 | 0 | 5 | 5 | 5 | 5 | 5 | 5 |
| Daly City | 20 | 10 | 25 | 30 | 25 | 25 | 25 | 25 | 25 |
| East Palo Alto | 5 | 0 | 15 | 20 | 20 | 20 | 20 | 20 | 20 |
| Foster City | 0 | 0 | 110 | 125 | 130 | 130 | 130 | 135 | 135 |
| Half Moon Bay | 720 | 605 | 335 | 355 | 350 | 345 | 345 | 345 | 345 |
| Hillsborough | 10 | 5 | 15 | 15 | 15 | 15 | 15 | 15 | 15 |
| Menlo Park | 30 | 50 | 115 | 120 | 120 | 120 | 120 | 115 | 115 |
| Millbrae | 0 | 0 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Pacifica | 0 | 5 | 5 | 10 | 10 | 10 | 10 | 10 | 10 |
| Portola Valley | 25 | 30 | 475 | 475 | 470 | 470 | 465 | 465 | 465 |
| Redwood City | 15 | 15 | 35 | 85 | 85 | 80 | 80 | 80 | 85 |
| San Bruno | 0 | 0 | 20 | 30 | 30 | 30 | 30 | 30 | 30 |
| San Carlos | 5 | 10 | 40 | 45 | 45 | 45 | 45 | 45 | 40 |
| San Mateo | 5 | 5 | 25 | 30 | 35 | 35 | 35 | 35 | 35 |
| South San Francisco | 10 | 5 | 120 | 155 | 150 | 150 | 155 | 150 | 150 |
| Woodside | 45 | 55 | 80 | 75 | 75 | 75 | 75 | 75 | 70 |
| Unincorporated | 610 | 420 | 825 | 820 | 820 | 815 | 815 | 810 | 810 |
| County | 1,625 | 1,440 | 2,305 | 2,475 | 2,460 | 2,455 | 2,450 | 2,435 | 2,440 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN MATEO MANUFACTURING, WHOLESALE AND TRANSPORTATION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 15 | 10 | 85 | 90 | 90 | 90 | 90 | 85 | 85 |
| Belmont | 595 | 925 | 845 | 855 | 830 | 825 | 820 | 800 | 785 |
| Brisbane | 3,685 | 3,300 | 2,710 | 2,455 | 2,370 | 2,525 | 2,515 | 2,520 | 2,645 |
| Burlingame | 14,530 | 17,625 | 6,440 | 6,015 | 5,610 | 5,250 | 4,950 | 5,180 | 4,955 |
| Colma | 110 | 100 | 155 | 165 | 150 | 150 | 150 | 155 | 155 |
| Daly City | 540 | 590 | 1,305 | 1,220 | 1,165 | 1,095 | 1,060 | 1,050 | 1,035 |
| East Palo Alto | 155 | 135 | 380 | 340 | 400 | 425 | 435 | 450 | 485 |
| Foster City | 2,160 | 1,190 | 1,390 | 1,505 | 1,465 | 1,420 | 1,330 | 1,240 | 1,265 |
| Half Moon Bay | 135 | 160 | 340 | 355 | 360 | 360 | 360 | 360 | 360 |
| Hillsborough | 320 | 690 | 175 | 180 | 180 | 180 | 180 | 185 | 185 |
| Menlo Park | 6,665 | 6,935 | 5,715 | 5,050 | 4,980 | 4,775 | 4,530 | 4,340 | 4,230 |
| Millbrae | 455 | 620 | 315 | 340 | 340 | 340 | 330 | 395 | 505 |
| Pacifica | 275 | 250 | 410 | 425 | 430 | 430 | 430 | 440 | 455 |
| Portola Valley | 10 | 10 | 70 | 75 | 75 | 75 | 75 | 75 | 75 |
| Redwood City | 3,475 | 2,570 | 14,510 | 12,800 | 11,990 | 11,220 | 10,480 | 9,790 | 9,225 |
| San Bruno | 650 | 675 | 1,085 | 1,040 | 1,005 | 950 | 930 | 860 | 820 |
| San Carlos | 3,805 | 2,520 | 4,350 | 3,845 | 3,670 | 3,525 | 3,390 | 3,230 | 3,075 |
| San Mateo | 1,735 | 2,010 | 4,060 | 4,005 | 3,815 | 3,690 | 3,565 | 3,350 | 3,160 |
| South San Francisco | 21,270 | 22,755 | 14,945 | 13,275 | 12,710 | 12,130 | 11,520 | 10,885 | 10,760 |
| Woodside | 55 | 55 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Unincorporated | 3,025 | 5,225 | 4,335 | 4,180 | 4,115 | 4,030 | 4,000 | 3,945 | 3,940 |
| County | 64,680 | 70,125 | 63,720 | 58,320 | 55,850 | 53,595 | 51,240 | 49,430 | 48,305 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN MATEO RETAIL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 95 | 45 | 30 | 30 | 30 | 30 | 30 | 30 | 30 |
| Belmont | 735 | 760 | 755 | 935 | 950 | 940 | 935 | 950 | 965 |
| Brisbane | 475 | 530 | 230 | 245 | 855 | 855 | 810 | 795 | 790 |
| Burlingame | 2,220 | 2,315 | 2,795 | 2,890 | 2,905 | 2,995 | 3,030 | 3,005 | 2,985 |
| Colma | 2,765 | 2,885 | 2,040 | 2,075 | 2,180 | 2,285 | 2,325 | 2,395 | 2,435 |
| Daly City | 4,265 | 4,425 | 3,295 | 2,725 | 2,460 | 2,255 | 2,060 | 1,885 | 1,695 |
| East Palo Alto | 1,230 | 910 | 700 | 785 | 795 | 795 | 785 | 830 | 840 |
| Foster City | 1,140 | 795 | 960 | 1,040 | 1,055 | 1,055 | 1,055 | 1,065 | 1,140 |
| Half Moon Bay | 705 | 660 | 440 | 485 | 485 | 490 | 495 | 495 | 495 |
| Hillsborough | 110 | 110 | 35 | 35 | 35 | 35 | 35 | 35 | 35 |
| Menlo Park | 1,570 | 1,630 | 1,305 | 1,495 | 1,640 | 1,725 | 1,805 | 1,790 | 1,780 |
| Millbrae | 855 | 775 | 755 | 780 | 785 | 790 | 925 | 925 | 920 |
| Pacifica | 900 | 785 | 930 | 945 | 950 | 950 | 960 | 960 | 965 |
| Portola Valley | 30 | 25 | 20 | 45 | 45 | 45 | 45 | 45 | 45 |
| Redwood City | 4,835 | 5,315 | 4,305 | 4,770 | 4,785 | 4,840 | 5,130 | 5,335 | 5,550 |
| San Bruno | 2,780 | 2,400 | 2,575 | 2,640 | 2,645 | 2,685 | 2,720 | 2,785 | 2,985 |
| San Carlos | 1,885 | 2,230 | 1,780 | 1,860 | 1,845 | 1,850 | 1,845 | 1,835 | 1,800 |
| San Mateo | 6,615 | 7,120 | 7,080 | 7,815 | 8,045 | 8,375 | 8,855 | 8,885 | 8,950 |
| South San Francisco | 3,520 | 2,810 | 3,495 | 3,730 | 3,845 | 3,940 | 4,195 | 4,185 | 4,100 |
| Woodside | 200 | 280 | 130 | 180 | 180 | 180 | 180 | 180 | 180 |
| Unincorporated | 1,615 | 1,495 | 970 | 1,010 | 1,010 | 1,000 | 1,000 | 1,005 | 985 |
| County | 37,585 | 38,055 | 34,625 | 36,515 | 37,530 | 38,120 | 39,220 | 39,420 | 39,675 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN MATEO FINANCIAL AND PROFESSIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 220 | 215 | 550 | 560 | 560 | 560 | 560 | 565 | 565 |
| Belmont | 1,065 | 1,045 | 2,010 | 2,630 | 2,575 | 2,535 | 2,565 | 2,580 | 2,535 |
| Brisbane | 935 | 790 | 700 | 870 | 920 | 4,665 | 5,205 | 5,410 | 5,530 |
| Burlingame | 7,310 | 7,035 | 7,730 | 11,265 | 11,225 | 11,285 | 11,625 | 12,400 | 15,890 |
| Colma | 235 | 220 | 115 | 145 | 140 | 140 | 140 | 140 | 140 |
| Daly City | 3,180 | 2,240 | 3,515 | 3,940 | 3,790 | 3,770 | 3,805 | 3,875 | 5,370 |
| East Palo Alto | 795 | 810 | 1,630 | 1,465 | 1,445 | 1,420 | 1,410 | 1,350 | 1,305 |
| Foster City | 10,040 | 9,010 | 8,130 | 11,395 | 14,045 | 15,410 | 15,925 | 16,265 | 16,035 |
| Half Moon Bay | 720 | 905 | 1,230 | 1,320 | 1,325 | 1,330 | 1,335 | 1,340 | 1,340 |
| Hillsborough | 490 | 605 | 815 | 855 | 855 | 855 | 860 | 860 | 860 |
| Menlo Park | 9,365 | 13,005 | 12,040 | 14,355 | 14,845 | 15,050 | 15,335 | 15,645 | 18,680 |
| Millbrae | 560 | 855 | 1,060 | 1,225 | 1,230 | 1,240 | 1,230 | 1,250 | 3,310 |
| Pacifica | 685 | 570 | 1,420 | 1,455 | 1,465 | 1,475 | 1,475 | 1,480 | 1,745 |
| Portola Valley | 205 | 310 | 385 | 390 | 395 | 395 | 400 | 400 | 400 |
| Redwood City | 11,290 | 18,700 | 11,160 | 22,640 | 24,050 | 25,635 | 27,275 | 28,540 | 37,285 |
| San Bruno | 3,930 | 6,225 | 2,645 | 3,205 | 3,100 | 3,060 | 3,060 | 2,850 | 2,755 |
| San Carlos | 3,610 | 4,545 | 4,340 | 5,380 | 5,295 | 5,285 | 5,375 | 5,540 | 5,665 |
| San Mateo | 16,080 | 24,685 | 19,110 | 22,745 | 22,665 | 22,785 | 23,030 | 24,695 | 24,090 |
| South San Francisco | 9,080 | 10,810 | 6,915 | 10,585 | 12,395 | 15,855 | 16,960 | 17,890 | 18,080 |
| Woodside | 335 | 465 | 590 | 595 | 595 | 595 | 595 | 595 | 595 |
| Unincorporated | 5,525 | 4,110 | 5,580 | 7,570 | 7,445 | 7,400 | 7,440 | 7,520 | 7,450 |
| County | 85,630 | 106,975 | 91,670 | 124,590 | 130,365 | 140,750 | 145,610 | 151,195 | 169,620 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN MATEO HEALTH, EDUCATIONAL AND RECREATIONAL SERVICE JOBS

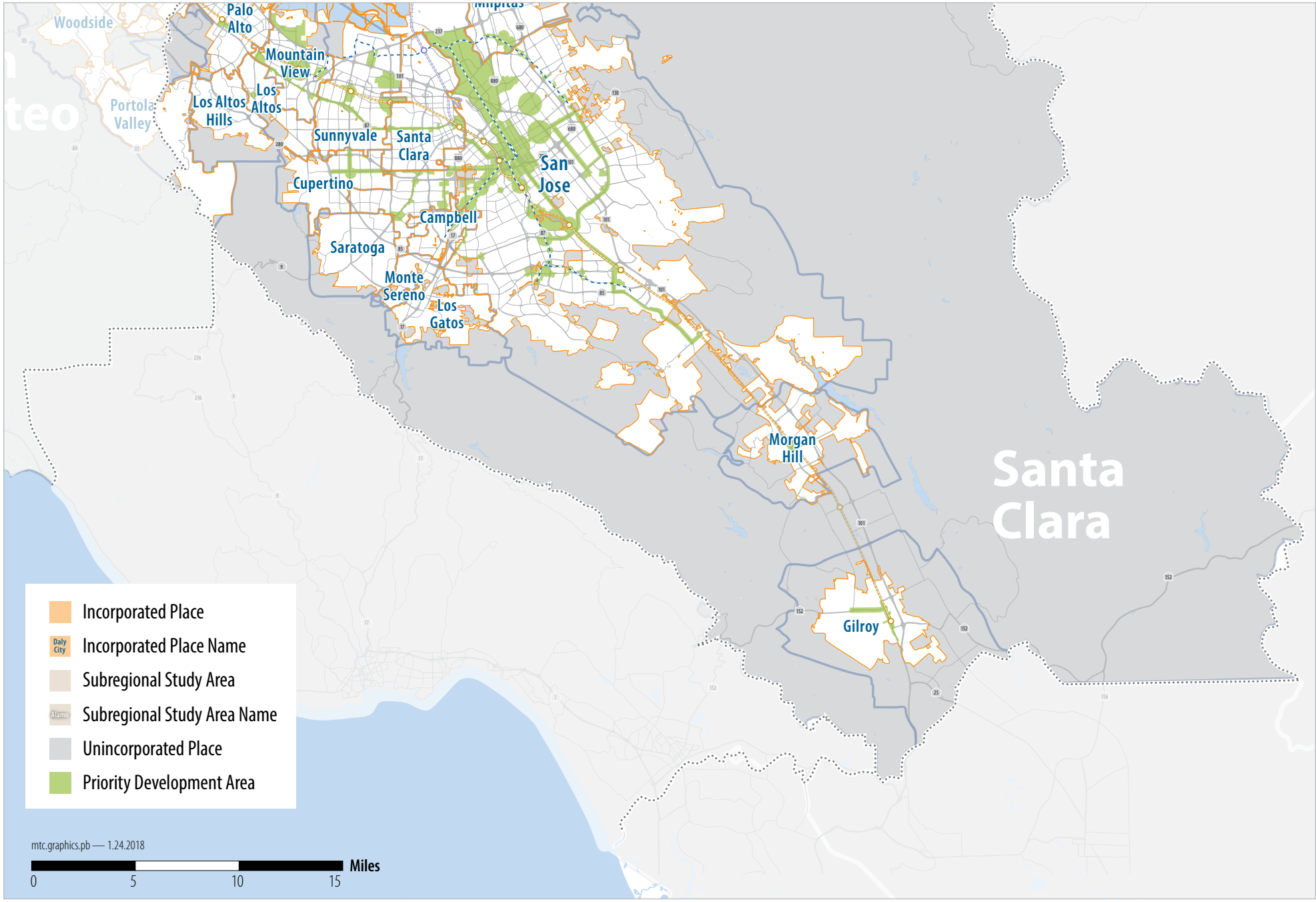
| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 1,280 | 1,905 | 1,240 | 1,230 | 1,230 | 1,230 | 1,230 | 1,240 | 1,240 |
| Belmont | 2,620 | 3,415 | 3,060 | 3,180 | 3,215 | 3,280 | 3,340 | 3,340 | 3,380 |
| Brisbane | 365 | 615 | 420 | 525 | 735 | 2,670 | 3,025 | 3,365 | 3,805 |
| Burlingame | 10,870 | 12,515 | 7,650 | 7,680 | 7,850 | 8,000 | 8,290 | 9,080 | 11,015 |
| Colma | 835 | 845 | 1,215 | 1,215 | 1,160 | 1,135 | 1,135 | 1,130 | 1,135 |
| Daly City | 9,145 | 9,715 | 8,125 | 7,845 | 7,815 | 7,940 | 8,175 | 8,660 | 10,640 |
| East Palo Alto | 1,520 | 1,755 | 2,005 | 1,960 | 2,335 | 2,485 | 2,605 | 2,720 | 2,930 |
| Foster City | 3,465 | 2,540 | 2,870 | 3,445 | 4,190 | 4,495 | 4,570 | 4,610 | 4,825 |
| Half Moon Bay | 2,165 | 2,710 | 1,905 | 1,970 | 1,985 | 1,995 | 2,000 | 2,010 | 2,015 |
| Hillsborough | 595 | 680 | 775 | 790 | 790 | 795 | 795 | 800 | 805 |
| Menlo Park | 4,070 | 6,385 | 6,470 | 7,175 | 7,990 | 8,575 | 8,975 | 9,495 | 11,495 |
| Millbrae | 2,880 | 3,455 | 2,910 | 3,030 | 3,085 | 3,105 | 3,095 | 3,210 | 5,110 |
| Pacifica | 2,215 | 2,525 | 2,060 | 2,080 | 2,110 | 2,125 | 2,140 | 2,175 | 2,635 |
| Portola Valley | 870 | 945 | 390 | 370 | 370 | 370 | 370 | 370 | 370 |
| Redwood City | 11,345 | 15,565 | 13,480 | 13,895 | 15,275 | 16,030 | 16,460 | 17,405 | 20,925 |
| San Bruno | 3,865 | 4,215 | 4,520 | 5,010 | 5,120 | 5,200 | 5,425 | 5,410 | 5,660 |
| San Carlos | 3,345 | 5,105 | 3,110 | 3,475 | 3,640 | 3,815 | 4,120 | 4,425 | 4,945 |
| San Mateo | 12,750 | 18,140 | 14,130 | 16,840 | 19,000 | 20,450 | 21,660 | 22,765 | 23,140 |
| South San Francisco | 9,590 | 11,520 | 8,535 | 8,790 | 9,820 | 10,410 | 10,660 | 11,200 | 11,155 |
| Woodside | 635 | 835 | 725 | 715 | 715 | 715 | 715 | 715 | 715 |
| Unincorporated | 9,255 | 7,605 | 5,105 | 5,620 | 5,735 | 5,880 | 6,105 | 6,290 | 6,465 |
| County | 93,890 | 112,195 | 90,695 | 96,840 | 104,175 | 110,690 | 114,890 | 120,415 | 134,400 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SAN MATEO INFORMATION, GOVERNMENT AND CONSTRUCTION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Atherton | 720 | 685 | 230 | 230 | 230 | 235 | 235 | 240 | 245 |
| Belmont | 1,745 | 2,060 | 1,250 | 1,605 | 1,660 | 1,710 | 1,765 | 1,750 | 1,765 |
| Brisbane | 1,970 | 1,295 | 1,155 | 1,345 | 1,700 | 2,030 | 2,290 | 2,690 | 4,090 |
| Burlingame | 3,005 | 3,590 | 3,365 | 4,450 | 4,680 | 4,870 | 5,030 | 7,590 | 7,710 |
| Colma | 125 | 120 | 410 | 460 | 440 | 440 | 440 | 445 | 450 |
| Daly City | 3,035 | 3,265 | 2,160 | 2,990 | 3,115 | 3,310 | 3,450 | 3,680 | 3,710 |
| East Palo Alto | 630 | 730 | 395 | 615 | 815 | 945 | 1,045 | 1,035 | 1,080 |
| Foster City | 3,440 | 7,815 | 2,340 | 2,800 | 2,815 | 2,710 | 2,655 | 2,660 | 3,855 |
| Half Moon Bay | 1,000 | 585 | 665 | 760 | 780 | 790 | 795 | 805 | 820 |
| Hillsborough | 200 | 340 | 305 | 330 | 335 | 340 | 345 | 360 | 365 |
| Menlo Park | 3,450 | 13,410 | 8,980 | 6,910 | 6,840 | 6,725 | 6,435 | 6,385 | 6,175 |
| Millbrae | 745 | 720 | 875 | 1,095 | 1,130 | 1,150 | 1,145 | 1,605 | 1,740 |
| Pacifica | 1,350 | 1,460 | 1,095 | 1,165 | 1,200 | 1,215 | 1,230 | 1,275 | 1,305 |
| Portola Valley | 145 | 145 | 160 | 165 | 165 | 165 | 165 | 165 | 165 |
| Redwood City | 17,615 | 23,330 | 15,805 | 15,270 | 14,870 | 14,315 | 13,590 | 14,350 | 13,650 |
| San Bruno | 1,960 | 2,150 | 2,040 | 2,685 | 2,745 | 2,765 | 2,740 | 2,605 | 2,535 |
| San Carlos | 2,625 | 2,940 | 2,685 | 3,220 | 3,300 | 3,475 | 3,525 | 3,455 | 3,605 |
| San Mateo | 7,770 | 12,160 | 6,570 | 8,870 | 9,010 | 9,185 | 9,365 | 9,015 | 8,630 |
| South San Francisco | 4,195 | 4,740 | 4,710 | 6,460 | 7,445 | 7,585 | 7,515 | 7,415 | 9,985 |
| Woodside | 700 | 895 | 340 | 340 | 340 | 340 | 340 | 340 | 340 |
| Unincorporated | 8,285 | 6,965 | 4,795 | 5,260 | 5,305 | 5,405 | 5,500 | 5,445 | 5,395 |
| County | 64,450 | 88,765 | 60,325 | 67,025 | 68,900 | 69,695 | 69,595 | 73,305 | 77,605 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.


Woodside
Palo Alto
Mountain View
Los Altos
Los Altos Hills
Portola Valley
Sunnyvale
Santa Clara
San Jose
Cupertino
Campbell
Saratoga
Monte Sereno
Los Gatos
Morgan Hill
Gilroy
Santa Clara
Incorporated Place
Daly City
Incorporated Place Name
Subregional Study Area
Alamo
Subregional Study Area Name
Unincorporated Place
Priority Development Area
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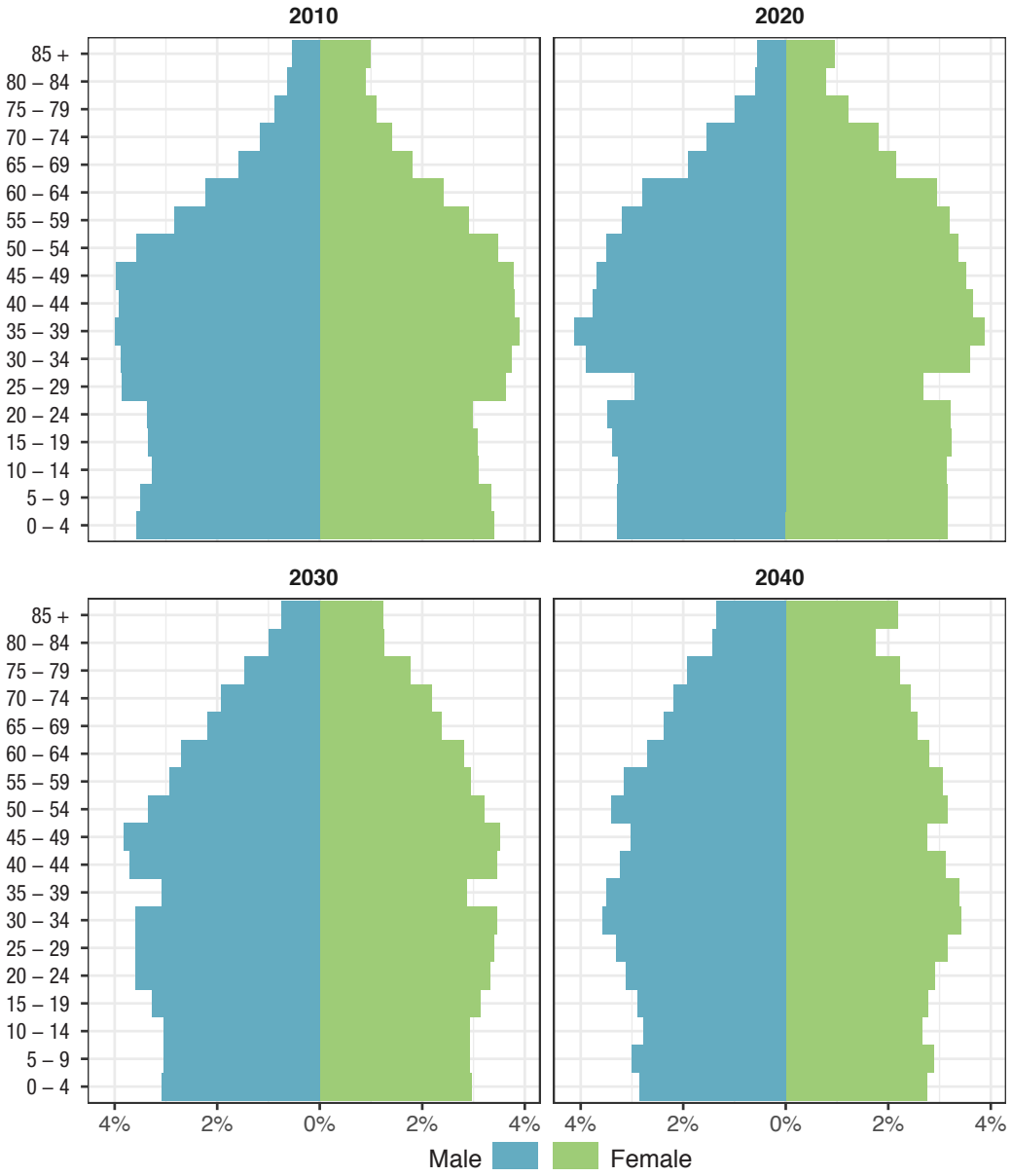
# Santa Clara County

## SANTA CLARA DATA SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 1,781,640 | 1,903,210 | 1,789,150 | 1,909,680 | 1,986,340 | 2,098,695 | 2,217,750 | 2,387,165 | 2,538,320 |
| Household Population | 1,751,290 | 1,872,240 | 1,758,350 | 1,877,070 | 1,951,920 | 2,062,295 | 2,179,230 | 2,346,350 | 2,495,105 |
| Households | 604,205 | 623,120 | 604,205 | 648,900 | 679,425 | 718,565 | 757,690 | 815,980 | 860,810 |
| Persons per Household | 2.90 | 3.00 | 2.91 | 2.89 | 2.87 | 2.87 | 2.88 | 2.88 | 2.90 |
| Employed Residents | 859,035 | 967,865 | 791,100 | 952,540 | 977,955 | 1,022,260 | 1,064,430 | 1,126,185 | 1,173,565 |
| Agriculture & Natural Resources | 2,500 | 2,205 | 4,255 | 5,055 | 5,030 | 4,985 | 4,965 | 4,920 | 4,890 |
| Construction | 37,275 | 47,940 | 48,660 | 63,555 | 66,395 | 70,035 | 74,695 | 81,495 | 92,275 |
| Manufacturing & Wholesale | 205,440 | 208,310 | 184,345 | 185,300 | 182,740 | 181,750 | 179,490 | 176,330 | 176,365 |
| Retail | 86,520 | 93,535 | 80,050 | 88,905 | 91,160 | 94,310 | 97,215 | 101,670 | 104,815 |
| Transportation & Utilities | 12,770 | 15,430 | 14,295 | 15,485 | 15,845 | 15,985 | 16,560 | 17,370 | 18,570 |
| Information | 51,165 | 72,605 | 38,055 | 56,420 | 55,720 | 56,725 | 57,190 | 55,415 | 56,945 |
| Financial & Leasing | 35,540 | 39,150 | 33,320 | 41,720 | 42,245 | 39,855 | 38,420 | 36,800 | 35,365 |
| Professional & Managerial Services | 182,775 | 226,980 | 178,945 | 259,990 | 268,620 | 277,310 | 290,775 | 300,025 | 310,930 |
| Health & Educational Services | 124,700 | 161,415 | 126,920 | 149,345 | 163,090 | 178,490 | 193,240 | 208,840 | 230,225 |
| Arts, Recreation & Other Services | 119,750 | 130,720 | 112,950 | 128,140 | 132,380 | 140,410 | 147,935 | 155,245 | 166,215 |
| Government | 54,850 | 68,515 | 89,010 | 92,825 | 96,680 | 98,810 | 97,510 | 92,595 | 93,010 |
| Total Jobs | 913,290 | 1,066,800 | 910,815 | 1,086,740 | 1,119,900 | 1,158,665 | 1,198,000 | 1,230,705 | 1,289,600 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## Projected Age Distribution, Santa Clara




Source: ABAG / MTC Plan Bay Area data

## COUNTY OVERVIEW

With 1.8 million residents, Santa Clara County is the most populous county in the Bay Area. Over the past six decades, Santa Clara has been transformed from a major agricultural area into Silicon Valley, the birthplace and premier global center of innovation in a range of technology industries.

Most cities are concentrated in the northwestern portion of the county, with the most populous cities situated adjacent to the San Francisco Bay. Morgan Hill and Gilroy are located along US Highway 101 to the south, while the remaining jurisdictions are located along the western side of the Santa Clara Valley adjacent to the Santa Cruz Mountains. Several rail systems serve the county including Caltrain, Altamont Commuter Express (ACE), Capitol Corridor, and the Valley Transportation Authority (VTA) light rail network. VTA also provides express and local bus service. BART service to San José is expected to open 2019, completing the long awaited BART extension from Fremont in Alameda County.

## POPULATION

The population of Santa Clara County is estimated to grow by 42 percent or just under 750,000 new residents, reaching 2.54 million people by 2040. San José, the largest city in the Bay Area, is projected to add over 426,000 residents over the next three decades, highest among all cities in the county. Meanwhile, Mountain View's population is projected to grow by the largest percentage (90 percent), passing the 100,000 mark well before 2040. The jurisdictions with populations less than 30,000 (Los Gatos, Los Altos, Los Altos Hills, Monte Sereno and Saratoga) are projected to experience the lowest rates of population growth (12 percent or less).

By 2040, the number of households in the county is projected to increase by over 256,000. This 42 percent increase represents the fastest projected growth rate of all counties in the Bay Area. San José accounts for 57 percent of the county's projected household growth, while growth in the next four largest cities (Sunnyvale, Mountain View, Santa Clara and Milpitas) account for a combined 31 percent.

## ECONOMY

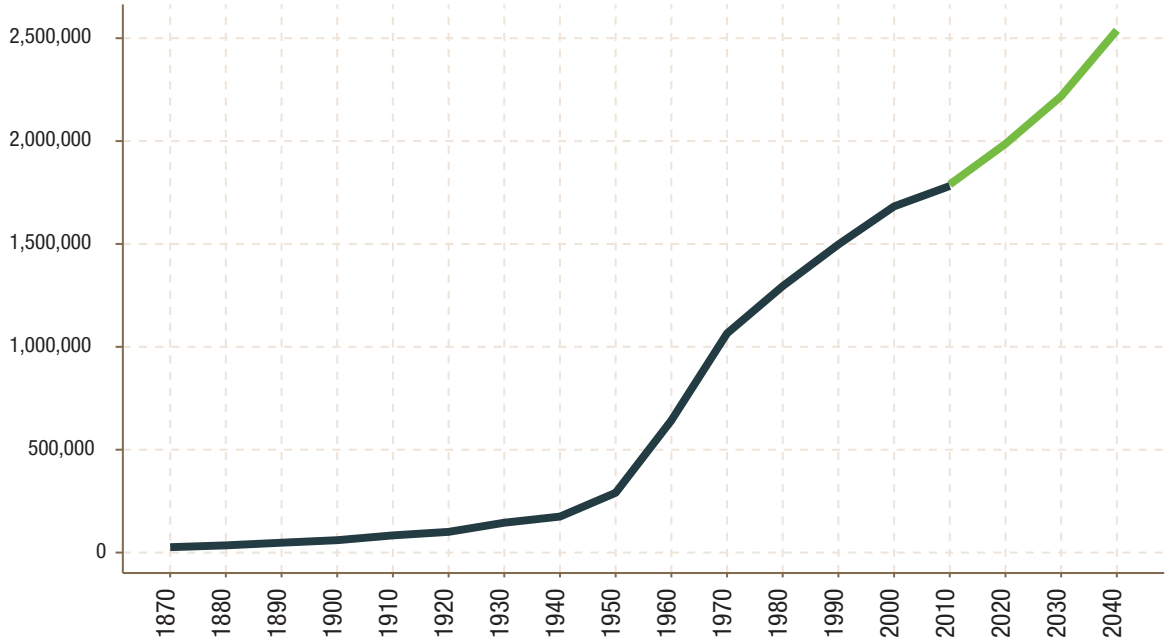
In addition to the high concentration of the semiconductor and computer industries for which the valley is renowned, Santa Clara County's economy also involves electronics, aerospace, medical devices, biotech, software, social media and other Internet-related industries, and the Valley is today more heavily focused on innovation than actual production of many of its products, instead relying on worldwide supply chains for locally designed products. The county has 13 Fortune 500 companies all in the technology sector, including Apple, Hewlett Packard, Intel and Google and receives a commanding share of US venture capital in search of new industries and companies. As of 2017, the county's largest employers were Apple, Alphabet (the parent company of Google), the county of Santa Clara, Stanford University and Cisco Systems.

Silicon Valley's technology cluster incorporates various sectors including Manufacturing, Information, and Professional Services. In 2010, the Manufacturing and Wholesale and Professional and Managerial Services sectors each comprised 20 percent of jobs in the county. The county makes up 27 percent of the region's jobs, yet it holds 43 percent of the Bay Area's jobs in Manufacturing and Wholesale, 32 percent of its Information jobs and 29 percent of its Professional and Managerial Services.

Santa Clara County is projected to experience a net increase of nearly 380,000 jobs between 2010 and 2040, representing a 42 percent increase. Yet, given the strong recovery following the Great Recession, a growth of just 19 percent remains from a 2015 baseline. San José accounts for some 44 percent of the county's projected job growth from 2010 to 2040, while the next five largest cities in terms of employment (Sunnyvale, Santa Clara, Mountain View, Milpitas and Palo Alto) account for a combined 37 percent. San José is also estimated to have the highest rate of employment growth with a 39 percent increase, followed by Palo Alto and Mountain View (each with a 33 percent increase).

By 2015, the county had nearly 1.9 million residents and over 1.1 million jobs. The county is projected to take on 31 percent of the region's total household growth and also 30 percent of its job growth by 2040. Nearly 80 percent of new households and 60 percent of new jobs are expected to occur in the county's 42 PDAs.

### Historic and Projected Population, Santa Clara




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

# Data Tables for Santa Clara County

## SANTA CLARA POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 39,350 | 42,065 | 40,080 | 42,630 | 43,700 | 44,620 | 46,170 | 46,495 | 47,120 |
| Cupertino | 58,300 | 58,680 | 59,130 | 62,800 | 63,515 | 64,730 | 65,690 | 66,565 | 68,305 |
| Gilroy | 48,820 | 54,100 | 49,075 | 47,205 | 48,820 | 53,565 | 61,935 | 69,360 | 70,375 |
| Los Altos | 28,975 | 30,465 | 29,190 | 31,500 | 31,530 | 31,895 | 32,225 | 32,655 | 32,960 |
| Los Altos Hills | 7,920 | 8,550 | 7,795 | 8,305 | 8,340 | 8,390 | 8,475 | 8,540 | 8,650 |
| Los Gatos | 29,415 | 31,060 | 30,295 | 31,230 | 31,635 | 32,120 | 32,560 | 32,780 | 33,050 |
| Milpitas | 66,790 | 73,905 | 67,425 | 87,570 | 90,645 | 92,895 | 95,605 | 97,295 | 103,970 |
| Monte Sereno | 3,340 | 3,455 | 3,225 | 3,365 | 3,440 | 3,485 | 3,535 | 3,545 | 3,575 |
| Morgan Hill | 37,880 | 42,330 | 38,270 | 42,565 | 43,285 | 45,680 | 48,130 | 49,240 | 50,165 |
| Mountain View | 74,065 | 77,250 | 74,375 | 82,585 | 111,725 | 112,875 | 119,445 | 128,085 | 138,980 |
| Palo Alto | 64,405 | 67,400 | 67,630 | 70,690 | 81,170 | 81,595 | 82,835 | 84,465 | 86,510 |
| San José | 945,940 | 1,027,210 | 949,775 | 1,003,160 | 1,028,210 | 1,110,405 | 1,189,660 | 1,283,360 | 1,377,145 |
| Santa Clara | 116,470 | 121,715 | 115,845 | 127,505 | 131,655 | 137,215 | 142,425 | 151,715 | 159,500 |
| Saratoga | 29,925 | 30,350 | 30,080 | 30,480 | 30,560 | 30,905 | 31,205 | 31,410 | 31,880 |
| Sunnyvale | 140,080 | 147,390 | 139,815 | 151,840 | 149,935 | 157,705 | 162,975 | 203,780 | 222,210 |
| Unincorporated | 89,960 | 87,290 | 87,135 | 86,245 | 88,170 | 90,605 | 94,885 | 97,875 | 103,925 |
| County | 1,781,640 | 1,903,210 | 1,789,150 | 1,909,680 | 1,986,340 | 2,098,695 | 2,217,750 | 2,387,165 | 2,538,320 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SANTA CLARA HOUSEHOLD POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 39,150 | 41,865 | 39,865 | 42,400 | 43,455 | 44,375 | 45,910 | 46,225 | 46,840 |
| Cupertino | 57,965 | 58,340 | 58,800 | 62,450 | 63,145 | 64,335 | 65,275 | 66,130 | 67,850 |
| Gilroy | 48,015 | 53,295 | 48,275 | 46,355 | 47,925 | 52,620 | 60,930 | 68,280 | 69,235 |
| Los Altos | 28,750 | 30,235 | 28,980 | 31,275 | 31,295 | 31,645 | 31,960 | 32,375 | 32,665 |
| Los Altos Hills | 7,870 | 8,495 | 7,660 | 8,160 | 8,190 | 8,230 | 8,300 | 8,360 | 8,460 |
| Los Gatos | 29,065 | 30,710 | 30,010 | 30,925 | 31,315 | 31,775 | 32,195 | 32,400 | 32,645 |
| Milpitas | 64,090 | 71,000 | 64,265 | 84,210 | 87,135 | 89,190 | 91,685 | 93,095 | 99,505 |
| Monte Sereno | 3,340 | 3,455 | 3,215 | 3,355 | 3,430 | 3,475 | 3,520 | 3,530 | 3,555 |
| Morgan Hill | 37,495 | 41,945 | 37,945 | 42,220 | 42,920 | 45,295 | 47,730 | 48,815 | 49,720 |
| Mountain View | 73,800 | 76,980 | 74,100 | 82,295 | 111,420 | 112,550 | 119,105 | 127,725 | 138,595 |
| Palo Alto | 63,820 | 66,875 | 64,250 | 67,120 | 77,350 | 77,550 | 78,555 | 79,930 | 81,705 |
| San José | 932,620 | 1,013,420 | 935,565 | 988,120 | 1,012,330 | 1,093,820 | 1,172,085 | 1,264,745 | 1,357,845 |
| Santa Clara | 113,270 | 118,520 | 113,645 | 125,175 | 129,195 | 134,375 | 139,435 | 148,550 | 155,740 |
| Saratoga | 29,725 | 30,150 | 29,900 | 30,290 | 30,355 | 30,690 | 30,980 | 31,170 | 31,625 |
| Sunnyvale | 139,230 | 146,540 | 138,980 | 150,955 | 148,995 | 156,715 | 161,920 | 202,670 | 221,040 |
| Unincorporated | 83,080 | 80,410 | 82,895 | 81,765 | 83,465 | 85,655 | 89,635 | 92,350 | 98,075 |
| County | 1,751,290 | 1,872,240 | 1,758,350 | 1,877,070 | 1,951,920 | 2,062,295 | 2,179,230 | 2,346,350 | 2,495,105 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SANTA CLARA HOUSEHOLDS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 16,165 | 16,700 | 16,165 | 17,340 | 17,805 | 18,185 | 18,775 | 18,730 | 18,760 |
| Cupertino | 20,180 | 19,625 | 20,180 | 21,745 | 22,005 | 22,405 | 22,620 | 22,675 | 22,955 |
| Gilroy | 14,175 | 15,205 | 14,175 | 13,565 | 14,035 | 15,325 | 17,680 | 19,620 | 19,605 |
| Los Altos | 10,745 | 10,920 | 10,745 | 11,550 | 11,580 | 11,690 | 11,760 | 11,780 | 11,720 |
| Los Altos Hills | 2,830 | 2,950 | 2,830 | 3,005 | 3,010 | 3,035 | 3,045 | 3,030 | 3,020 |
| Los Gatos | 12,355 | 12,615 | 12,355 | 12,730 | 12,890 | 13,090 | 13,200 | 13,135 | 13,045 |
| Milpitas | 19,185 | 20,540 | 19,185 | 26,415 | 27,425 | 28,090 | 28,835 | 29,005 | 30,430 |
| Monte Sereno | 1,210 | 1,210 | 1,210 | 1,290 | 1,310 | 1,325 | 1,335 | 1,325 | 1,320 |
| Morgan Hill | 12,325 | 13,325 | 12,325 | 13,710 | 13,955 | 14,710 | 15,420 | 15,675 | 15,785 |
| Mountain View | 31,955 | 32,210 | 31,955 | 35,470 | 47,760 | 48,315 | 50,930 | 54,260 | 58,330 |
| Palo Alto | 26,495 | 26,830 | 26,495 | 27,585 | 31,975 | 32,020 | 32,300 | 32,620 | 32,940 |
| San José | 301,365 | 316,460 | 301,365 | 321,290 | 331,095 | 359,935 | 386,605 | 420,175 | 448,310 |
| Santa Clara | 43,020 | 43,500 | 43,020 | 46,980 | 48,555 | 50,465 | 52,110 | 54,855 | 57,010 |
| Saratoga | 10,735 | 10,520 | 10,735 | 10,825 | 10,860 | 10,965 | 11,020 | 10,970 | 10,965 |
| Sunnyvale | 53,385 | 54,295 | 53,385 | 57,750 | 56,940 | 60,115 | 61,935 | 77,450 | 84,170 |
| Unincorporated | 28,080 | 26,205 | 28,080 | 27,650 | 28,220 | 28,905 | 30,120 | 30,670 | 32,445 |
| County | 604,205 | 623,120 | 604,205 | 648,900 | 679,425 | 718,565 | 757,690 | 815,980 | 860,810 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SANTA CLARA PERSONS PER HOUSEHOLD

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 2.42 | 2.51 | 2.47 | 2.45 | 2.44 | 2.44 | 2.45 | 2.47 | 2.50 |
| Cupertino | 2.87 | 2.97 | 2.91 | 2.87 | 2.87 | 2.87 | 2.89 | 2.92 | 2.96 |
| Gilroy | 3.39 | 3.51 | 3.41 | 3.42 | 3.41 | 3.43 | 3.45 | 3.48 | 3.53 |
| Los Altos | 2.68 | 2.77 | 2.70 | 2.71 | 2.70 | 2.71 | 2.72 | 2.75 | 2.79 |
| Los Altos Hills | 2.78 | 2.88 | 2.71 | 2.71 | 2.72 | 2.71 | 2.73 | 2.76 | 2.80 |
| Los Gatos | 2.35 | 2.43 | 2.43 | 2.43 | 2.43 | 2.43 | 2.44 | 2.47 | 2.50 |
| Milpitas | 3.34 | 3.46 | 3.35 | 3.19 | 3.18 | 3.18 | 3.18 | 3.21 | 3.27 |
| Monte Sereno | 2.76 | 2.86 | 2.65 | 2.60 | 2.62 | 2.63 | 2.63 | 2.66 | 2.69 |
| Morgan Hill | 3.04 | 3.15 | 3.08 | 3.08 | 3.08 | 3.08 | 3.10 | 3.11 | 3.15 |
| Mountain View | 2.31 | 2.39 | 2.32 | 2.32 | 2.33 | 2.33 | 2.34 | 2.35 | 2.38 |
| Palo Alto | 2.41 | 2.49 | 2.43 | 2.43 | 2.42 | 2.42 | 2.43 | 2.45 | 2.48 |
| San José | 3.09 | 3.20 | 3.10 | 3.08 | 3.06 | 3.04 | 3.03 | 3.01 | 3.03 |
| Santa Clara | 2.63 | 2.72 | 2.64 | 2.66 | 2.66 | 2.66 | 2.68 | 2.71 | 2.73 |
| Saratoga | 2.77 | 2.87 | 2.79 | 2.80 | 2.80 | 2.80 | 2.81 | 2.84 | 2.88 |
| Sunnyvale | 2.61 | 2.70 | 2.60 | 2.61 | 2.62 | 2.61 | 2.61 | 2.62 | 2.63 |
| Unincorporated | 2.96 | 3.07 | 2.95 | 2.96 | 2.96 | 2.96 | 2.98 | 3.01 | 3.02 |
| County | 2.90 | 3.00 | 2.91 | 2.89 | 2.87 | 2.87 | 2.88 | 2.88 | 2.90 |

Source: Calculated from Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SANTA CLARA EMPLOYED RESIDENTS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 22,025 | 23,035 | 19,570 | 23,275 | 23,475 | 23,525 | 24,010 | 23,680 | 23,420 |
| Cupertino | 25,575 | 27,015 | 23,725 | 28,740 | 29,000 | 29,340 | 29,575 | 29,505 | 29,725 |
| Gilroy | 22,140 | 26,695 | 19,835 | 20,880 | 20,945 | 22,250 | 25,125 | 27,770 | 27,375 |
| Los Altos | 12,215 | 13,410 | 11,800 | 15,100 | 15,160 | 15,350 | 15,415 | 15,410 | 15,315 |
| Los Altos Hills | 3,075 | 3,625 | 3,310 | 4,320 | 4,405 | 4,480 | 4,555 | 4,510 | 4,515 |
| Los Gatos | 13,280 | 14,735 | 14,015 | 16,430 | 16,545 | 16,665 | 16,795 | 16,590 | 16,350 |
| Milpitas | 31,705 | 37,815 | 27,990 | 40,705 | 41,640 | 41,955 | 42,440 | 42,130 | 43,990 |
| Monte Sereno | 1,445 | 1,480 | 1,300 | 1,550 | 1,565 | 1,570 | 1,570 | 1,555 | 1,540 |
| Morgan Hill | 18,030 | 21,055 | 16,310 | 20,510 | 20,490 | 21,050 | 21,715 | 21,770 | 21,580 |
| Mountain View | 41,815 | 46,410 | 37,590 | 47,050 | 58,490 | 62,225 | 64,710 | 67,585 | 71,855 |
| Palo Alto | 31,030 | 32,555 | 31,915 | 38,495 | 45,215 | 45,215 | 45,650 | 46,050 | 46,275 |
| San José | 453,565 | 517,495 | 415,105 | 493,885 | 499,315 | 531,195 | 561,040 | 593,985 | 624,620 |
| Santa Clara | 57,460 | 66,785 | 53,585 | 65,770 | 67,045 | 69,020 | 70,500 | 73,835 | 76,325 |
| Saratoga | 12,645 | 13,440 | 12,285 | 14,755 | 14,930 | 15,170 | 15,340 | 15,280 | 15,235 |
| Sunnyvale | 73,100 | 80,665 | 65,200 | 79,385 | 77,740 | 80,845 | 82,330 | 102,425 | 109,250 |
| Unincorporated | 39,930 | 41,645 | 37,575 | 41,695 | 41,995 | 42,405 | 43,665 | 44,090 | 46,195 |
| County | 859,035 | 967,865 | 791,100 | 952,540 | 977,955 | 1,022,260 | 1,064,430 | 1,126,185 | 1,173,565 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## SANTA CLARA TOTAL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 22,815 | 30,265 | 25,455 | 28,995 | 29,870 | 30,685 | 31,825 | 32,625 | 32,745 |
| Cupertino | 34,915 | 43,655 | 26,810 | 27,515 | 34,795 | 37,060 | 37,830 | 38,055 | 37,980 |
| Gilroy | 16,405 | 17,775 | 17,835 | 17,740 | 18,330 | 19,175 | 20,570 | 21,965 | 22,315 |
| Los Altos | 10,200 | 13,110 | 14,135 | 16,340 | 16,420 | 16,590 | 16,880 | 16,940 | 17,235 |
| Los Altos Hills | 2,425 | 2,310 | 1,585 | 1,660 | 1,640 | 1,660 | 1,665 | 1,670 | 1,670 |
| Los Gatos | 17,590 | 20,035 | 18,895 | 18,860 | 19,590 | 20,035 | 20,425 | 20,605 | 20,620 |
| Milpitas | 38,830 | 48,945 | 42,015 | 48,180 | 46,810 | 53,640 | 56,035 | 57,580 | 58,030 |
| Monte Sereno | 295 | 450 | 530 | 550 | 555 | 560 | 560 | 560 | 560 |
| Morgan Hill | 14,940 | 15,865 | 19,285 | 18,180 | 18,130 | 18,235 | 18,865 | 19,470 | 19,600 |
| Mountain View | 66,700 | 76,410 | 48,485 | 58,860 | 62,965 | 66,485 | 68,350 | 69,830 | 73,265 |
| Palo Alto | 94,905 | 116,870 | 101,935 | 126,305 | 121,740 | 123,245 | 125,065 | 126,030 | 126,510 |
| San José | 384,305 | 438,795 | 387,510 | 457,075 | 470,625 | 481,905 | 493,575 | 511,445 | 554,875 |
| Santa Clara | 96,255 | 115,825 | 102,950 | 136,980 | 143,565 | 151,310 | 165,255 | 169,590 | 170,575 |
| Saratoga | 8,745 | 8,695 | 8,750 | 8,750 | 8,675 | 8,780 | 8,985 | 9,100 | 9,085 |
| Sunnyvale | 84,780 | 95,105 | 65,720 | 87,085 | 92,305 | 95,115 | 97,170 | 99,595 | 108,640 |
| Unincorporated | 19,185 | 22,690 | 29,635 | 34,155 | 34,395 | 34,640 | 35,310 | 35,930 | 36,155 |
| County | 913,290 | 1,066,800 | 911,530 | 1,087,225 | 1,120,420 | 1,159,110 | 1,198,370 | 1,231,000 | 1,289,870 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SANTA CLARA AGRICULTURE AND NATURAL RESOURCES JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 5 | 0 | 25 | 45 | 45 | 45 | 45 | 45 | 45 |
| Cupertino | 0 | 0 | 70 | 85 | 90 | 90 | 90 | 95 | 95 |
| Gilroy | 115 | 220 | 670 | 700 | 695 | 695 | 690 | 680 | 680 |
| Los Altos | 25 | 155 | 40 | 50 | 50 | 50 | 50 | 50 | 50 |
| Los Altos Hills | 20 | 5 | 0 | 5 | 5 | 5 | 5 | 5 | 5 |
| Los Gatos | 25 | 50 | 45 | 45 | 45 | 45 | 45 | 45 | 45 |
| Milpitas | 10 | 5 | 25 | 65 | 60 | 60 | 65 | 65 | 65 |
| Monte Sereno | 0 | 15 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| Morgan Hill | 465 | 425 | 820 | 800 | 785 | 780 | 780 | 780 | 775 |
| Mountain View | 70 | 60 | 15 | 30 | 30 | 30 | 30 | 30 | 30 |
| Palo Alto | 35 | 20 | 40 | 120 | 115 | 115 | 115 | 115 | 115 |
| San José | 985 | 770 | 1,270 | 1,640 | 1,640 | 1,605 | 1,600 | 1,575 | 1,560 |
| Santa Clara | 120 | 30 | 125 | 285 | 290 | 295 | 300 | 285 | 285 |
| Saratoga | 105 | 20 | 25 | 30 | 30 | 35 | 35 | 35 | 35 |
| Sunnyvale | 35 | 5 | 45 | 120 | 120 | 125 | 120 | 125 | 125 |
| Unincorporated | 320 | 230 | 1,025 | 1,025 | 1,015 | 1,005 | 995 | 985 | 980 |
| County | 2,500 | 2,205 | 4,255 | 5,055 | 5,030 | 4,985 | 4,965 | 4,920 | 4,890 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SANTA CLARA MANUFACTURING, WHOLESALE AND TRANSPORTATION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 2,990 | 3,110 | 2,855 | 3,070 | 3,235 | 3,425 | 3,605 | 3,715 | 3,810 |
| Cupertino | 16,040 | 24,590 | 9,185 | 7,075 | 6,930 | 6,555 | 6,125 | 5,685 | 5,330 |
| Gilroy | 2,645 | 2,365 | 2,055 | 2,030 | 2,200 | 2,385 | 2,625 | 2,905 | 3,045 |
| Los Altos | 390 | 300 | 510 | 605 | 585 | 595 | 570 | 535 | 530 |
| Los Altos Hills | 10 | 30 | 40 | 50 | 50 | 50 | 45 | 45 | 45 |
| Los Gatos | 1,345 | 1,080 | 1,620 | 1,545 | 1,655 | 1,690 | 1,715 | 1,710 | 1,710 |
| Milpitas | 15,410 | 18,300 | 14,180 | 14,995 | 14,775 | 15,495 | 15,860 | 15,985 | 15,780 |
| Monte Sereno | 15 | 15 | 45 | 45 | 45 | 45 | 45 | 45 | 45 |
| Morgan Hill | 4,670 | 4,925 | 5,745 | 5,010 | 4,920 | 4,875 | 4,900 | 4,930 | 4,950 |
| Mountain View | 6,045 | 4,565 | 8,285 | 8,860 | 8,815 | 9,245 | 9,140 | 8,980 | 8,880 |
| Palo Alto | 10,430 | 10,250 | 10,040 | 11,255 | 10,870 | 10,865 | 10,840 | 10,580 | 10,440 |
| San José | 93,165 | 92,180 | 84,700 | 86,300 | 86,335 | 85,500 | 84,830 | 85,075 | 88,465 |
| Santa Clara | 32,685 | 35,110 | 35,120 | 35,340 | 34,355 | 33,745 | 32,960 | 31,370 | 29,820 |
| Saratoga | 320 | 225 | 530 | 515 | 500 | 495 | 485 | 495 | 475 |
| Sunnyvale | 30,655 | 25,040 | 21,480 | 21,930 | 21,135 | 20,470 | 19,815 | 18,915 | 18,815 |
| Unincorporated | 755 | 705 | 2,615 | 2,630 | 2,675 | 2,780 | 3,020 | 3,350 | 3,530 |
| County | 218,210 | 223,740 | 199,005 | 201,255 | 199,085 | 198,220 | 196,580 | 194,310 | 195,675 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SANTA CLARA RETAIL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 2,845 | 3,015 | 3,195 | 3,490 | 3,500 | 3,525 | 3,575 | 3,530 | 3,470 |
| Cupertino | 2,725 | 2,365 | 2,645 | 2,225 | 2,095 | 1,920 | 1,730 | 1,565 | 1,425 |
| Gilroy | 4,295 | 4,625 | 4,385 | 4,410 | 4,500 | 4,835 | 5,430 | 5,875 | 5,880 |
| Los Altos | 1,025 | 1,230 | 1,045 | 920 | 875 | 875 | 865 | 850 | 830 |
| Los Altos Hills | 330 | 390 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| Los Gatos | 2,210 | 2,250 | 1,995 | 1,760 | 1,690 | 1,620 | 1,520 | 1,425 | 1,360 |
| Milpitas | 5,260 | 5,535 | 4,625 | 5,065 | 5,090 | 5,120 | 5,145 | 5,105 | 5,205 |
| Monte Sereno | 0 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Morgan Hill | 1,490 | 1,795 | 1,985 | 2,265 | 2,280 | 2,355 | 2,400 | 2,405 | 2,380 |
| Mountain View | 5,015 | 3,740 | 5,155 | 6,035 | 7,850 | 7,840 | 8,130 | 8,445 | 8,880 |
| Palo Alto | 6,260 | 7,290 | 4,635 | 4,965 | 5,675 | 5,635 | 5,640 | 5,625 | 5,590 |
| San José | 44,315 | 49,535 | 35,830 | 40,875 | 41,085 | 43,735 | 45,810 | 48,400 | 50,535 |
| Santa Clara | 4,630 | 5,575 | 6,800 | 8,200 | 8,150 | 8,260 | 8,325 | 8,560 | 8,755 |
| Saratoga | 460 | 395 | 465 | 415 | 380 | 355 | 315 | 285 | 260 |
| Sunnyvale | 5,260 | 5,540 | 5,955 | 6,885 | 6,585 | 6,845 | 6,915 | 8,180 | 8,780 |
| Unincorporated | 945 | 860 | 1,325 | 1,385 | 1,395 | 1,385 | 1,405 | 1,410 | 1,455 |
| County | 86,520 | 93,535 | 80,050 | 88,905 | 91,160 | 94,310 | 97,215 | 101,670 | 104,815 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SANTA CLARA FINANCIAL AND PROFESSIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 5,395 | 7,750 | 7,400 | 8,205 | 7,945 | 7,735 | 7,725 | 7,720 | 7,440 |
| Cupertino | 5,300 | 6,380 | 4,980 | 6,455 | 10,395 | 11,900 | 12,525 | 13,125 | 13,245 |
| Gilroy | 1,315 | 1,530 | 2,355 | 2,315 | 2,235 | 2,170 | 2,145 | 2,110 | 2,005 |
| Los Altos | 3,695 | 4,285 | 4,855 | 6,080 | 6,015 | 5,960 | 5,995 | 6,040 | 6,020 |
| Los Altos Hills | 460 | 295 | 770 | 850 | 840 | 860 | 875 | 900 | 905 |
| Los Gatos | 3,760 | 5,095 | 4,710 | 4,875 | 4,910 | 4,920 | 4,935 | 4,970 | 4,925 |
| Milpitas | 5,800 | 8,805 | 6,920 | 8,375 | 7,765 | 9,635 | 10,050 | 10,260 | 10,025 |
| Monte Sereno | 80 | 75 | 280 | 295 | 295 | 295 | 295 | 295 | 295 |
| Morgan Hill | 2,550 | 2,470 | 3,090 | 2,925 | 2,815 | 2,715 | 2,745 | 2,730 | 2,650 |
| Mountain View | 17,075 | 17,205 | 14,580 | 17,220 | 17,425 | 17,700 | 17,690 | 17,805 | 18,250 |
| Palo Alto | 27,530 | 36,545 | 24,560 | 42,330 | 43,165 | 43,260 | 43,815 | 44,390 | 44,060 |
| San José | 90,385 | 103,120 | 87,475 | 117,590 | 117,725 | 117,200 | 117,685 | 118,555 | 126,830 |
| Santa Clara | 27,825 | 35,960 | 26,510 | 47,100 | 49,500 | 52,190 | 61,205 | 65,510 | 66,225 |
| Saratoga | 1,440 | 2,040 | 2,495 | 2,675 | 2,590 | 2,575 | 2,615 | 2,690 | 2,620 |
| Sunnyvale | 24,340 | 33,495 | 15,715 | 26,155 | 29,125 | 30,130 | 30,880 | 31,635 | 32,830 |
| Unincorporated | 2,575 | 2,025 | 5,355 | 7,915 | 7,740 | 7,490 | 7,515 | 7,550 | 7,380 |
| County | 218,315 | 266,130 | 212,060 | 301,355 | 310,480 | 316,725 | 328,700 | 336,280 | 345,705 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SANTA CLARA HEALTH, EDUCATIONAL AND RECREATIONAL SERVICE JOBS

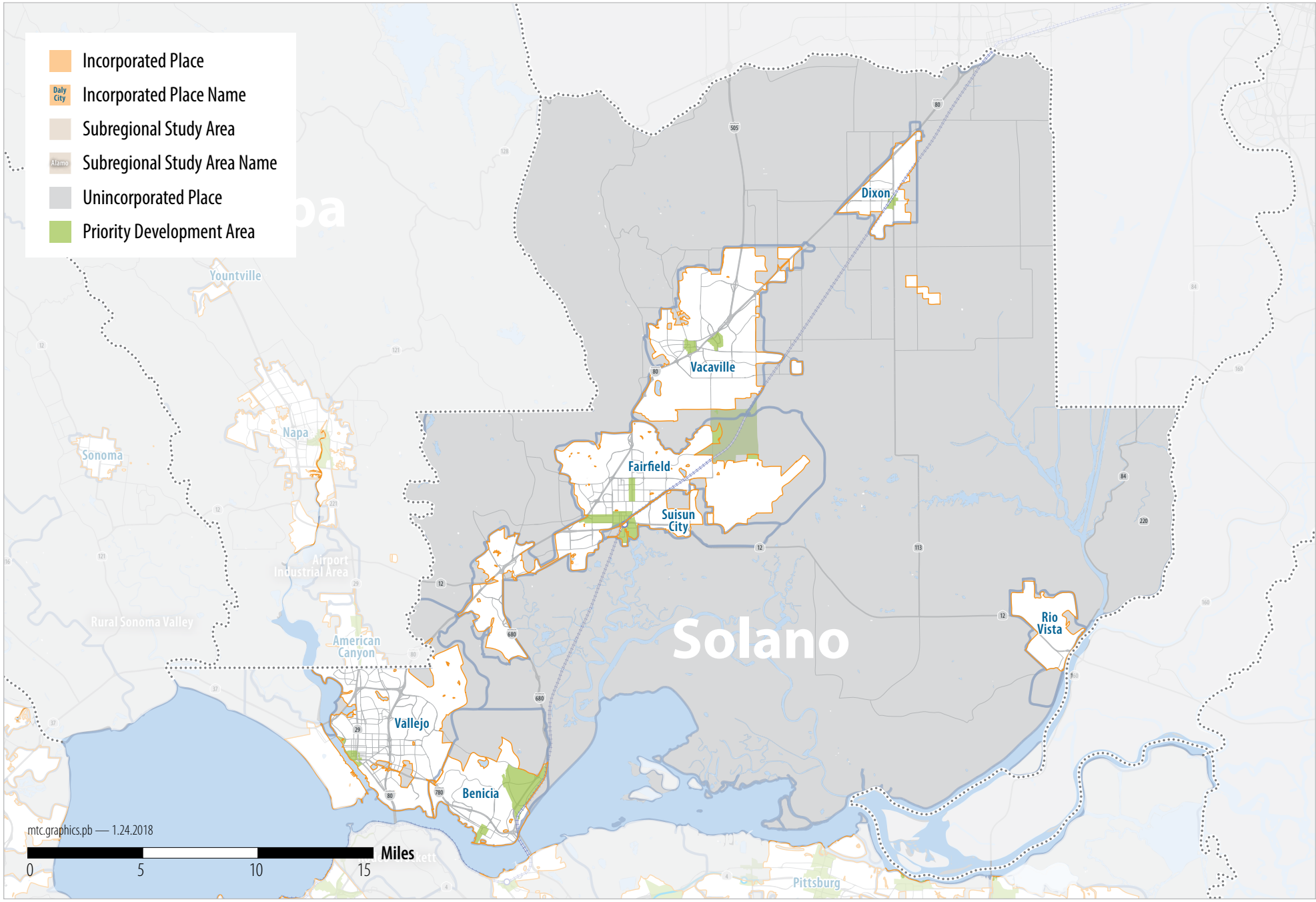
| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 7,715 | 9,770 | 6,410 | 7,380 | 8,015 | 8,610 | 9,320 | 10,225 | 10,765 |
| Cupertino | 6,795 | 7,360 | 7,520 | 8,125 | 11,020 | 11,955 | 12,540 | 12,940 | 13,360 |
| Gilroy | 5,560 | 6,475 | 4,940 | 4,700 | 4,890 | 5,010 | 5,335 | 5,885 | 6,115 |
| Los Altos | 3,830 | 5,450 | 4,805 | 5,365 | 5,595 | 5,835 | 6,225 | 6,455 | 6,850 |
| Los Altos Hills | 530 | 535 | 540 | 495 | 490 | 490 | 495 | 480 | 475 |
| Los Gatos | 7,895 | 9,290 | 7,395 | 7,100 | 7,500 | 7,770 | 8,045 | 8,360 | 8,555 |
| Milpitas | 8,755 | 10,470 | 9,300 | 10,170 | 9,850 | 12,525 | 13,530 | 14,755 | 15,490 |
| Monte Sereno | 75 | 145 | 135 | 130 | 135 | 135 | 135 | 140 | 140 |
| Morgan Hill | 3,555 | 4,090 | 4,110 | 3,675 | 3,730 | 3,780 | 4,080 | 4,580 | 4,790 |
| Mountain View | 15,940 | 14,250 | 10,105 | 13,665 | 15,680 | 17,760 | 19,200 | 20,745 | 23,705 |
| Palo Alto | 36,440 | 44,560 | 54,690 | 56,305 | 50,670 | 51,630 | 52,610 | 53,430 | 54,585 |
| San José | 97,210 | 117,495 | 84,770 | 102,470 | 112,390 | 120,685 | 129,845 | 141,780 | 159,585 |
| Santa Clara | 20,610 | 25,725 | 16,650 | 23,585 | 28,140 | 33,105 | 37,945 | 40,260 | 42,270 |
| Saratoga | 4,500 | 4,150 | 3,705 | 3,515 | 3,535 | 3,615 | 3,780 | 3,880 | 4,015 |
| Sunnyvale | 11,800 | 15,800 | 12,305 | 16,705 | 19,255 | 20,930 | 22,540 | 24,135 | 29,320 |
| Unincorporated | 13,765 | 17,820 | 12,500 | 14,105 | 14,570 | 15,055 | 15,560 | 16,040 | 16,420 |
| County | 244,450 | 292,135 | 239,875 | 277,490 | 295,470 | 318,900 | 341,180 | 364,085 | 396,440 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SANTA CLARA INFORMATION, GOVERNMENT AND CONSTRUCTION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Campbell | 3,865 | 6,615 | 5,570 | 6,805 | 7,130 | 7,340 | 7,560 | 7,395 | 7,220 |
| Cupertino | 4,055 | 2,960 | 2,410 | 3,550 | 4,265 | 4,640 | 4,820 | 4,650 | 4,530 |
| Gilroy | 2,470 | 2,560 | 3,430 | 3,585 | 3,815 | 4,080 | 4,345 | 4,510 | 4,590 |
| Los Altos | 1,230 | 1,690 | 2,880 | 3,320 | 3,310 | 3,275 | 3,180 | 3,015 | 2,955 |
| Los Altos Hills | 1,080 | 1,050 | 225 | 255 | 245 | 245 | 240 | 235 | 230 |
| Los Gatos | 2,355 | 2,265 | 3,135 | 3,535 | 3,790 | 3,995 | 4,175 | 4,095 | 4,025 |
| Milpitas | 3,590 | 5,830 | 6,965 | 9,510 | 9,260 | 10,805 | 11,385 | 11,410 | 11,470 |
| Monte Sereno | 120 | 200 | 60 | 65 | 65 | 65 | 65 | 65 | 65 |
| Morgan Hill | 2,210 | 2,155 | 3,535 | 3,510 | 3,595 | 3,725 | 3,960 | 4,050 | 4,055 |
| Mountain View | 22,560 | 36,590 | 10,340 | 13,050 | 13,160 | 13,905 | 14,160 | 13,830 | 13,520 |
| Palo Alto | 14,210 | 18,210 | 7,965 | 11,330 | 11,250 | 11,740 | 12,045 | 11,890 | 11,715 |
| San José | 58,250 | 75,690 | 93,465 | 108,200 | 111,445 | 113,180 | 113,805 | 116,060 | 127,900 |
| Santa Clara | 10,385 | 13,420 | 17,745 | 22,470 | 23,125 | 23,715 | 24,520 | 23,605 | 23,225 |
| Saratoga | 1,920 | 1,865 | 1,525 | 1,605 | 1,645 | 1,705 | 1,765 | 1,720 | 1,685 |
| Sunnyvale | 12,690 | 15,225 | 10,215 | 15,290 | 16,085 | 16,620 | 16,900 | 16,610 | 18,775 |
| Unincorporated | 825 | 1,045 | 6,820 | 7,095 | 7,005 | 6,925 | 6,815 | 6,595 | 6,390 |
| County | 143,290 | 189,060 | 176,280 | 213,170 | 219,190 | 225,965 | 229,740 | 229,725 | 242,345 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.


Incorporated Place
Daly City
Incorporated Place Name
Subregional Study Area
Alamo
Subregional Study Area Name
Unincorporated Place
Priority Development Area
Solano
Dixon
Vacaville
Fairfield
Suisun City
Rio Vista
Vallejo
Benicia
American Canyon
Napa
Sonoma
Yountville
Airport Industrial Area
Rural Sonoma Valley
Pittsburg
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# Solano County

## SOLANO DATA SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 413,345 | 427,120 | 414,585 | 414,465 | 428,305 | 449,890 | 470,495 | 486,840 | 510,660 |
| Household Population | 400,890 | 416,070 | 402,160 | 401,365 | 414,465 | 435,250 | 455,025 | 470,490 | 493,380 |
| Households | 141,760 | 146,155 | 141,760 | 141,105 | 145,880 | 153,180 | 159,380 | 163,360 | 169,365 |
| Persons per Household | 2.83 | 2.85 | 2.84 | 2.84 | 2.84 | 2.84 | 2.85 | 2.88 | 2.91 |
| Employed Residents | 189,565 | 200,570 | 200,780 | 221,745 | 224,840 | 230,995 | 235,875 | 237,755 | 242,485 |
| Agriculture & Natural Resources | 1,295 | 1,985 | 1,815 | 1,935 | 1,945 | 1,955 | 1,950 | 1,970 | 1,975 |
| Construction | 9,195 | 14,390 | 8,375 | 10,015 | 10,210 | 10,655 | 11,555 | 12,845 | 13,775 |
| Manufacturing & Wholesale | 14,180 | 17,160 | 14,225 | 13,885 | 14,485 | 15,310 | 16,105 | 17,145 | 17,320 |
| Retail | 17,950 | 20,985 | 16,630 | 18,090 | 18,430 | 18,710 | 18,845 | 18,810 | 19,015 |
| Transportation & Utilities | 4,105 | 4,510 | 4,660 | 4,835 | 5,180 | 5,500 | 5,980 | 6,715 | 7,215 |
| Information | 1,870 | 1,305 | 1,530 | 2,015 | 1,940 | 1,940 | 1,985 | 1,945 | 1,865 |
| Financial & Leasing | 5,570 | 5,870 | 6,460 | 6,420 | 6,285 | 6,060 | 5,880 | 5,810 | 5,485 |
| Professional & Managerial Services | 12,880 | 13,075 | 9,675 | 10,730 | 10,545 | 10,855 | 11,260 | 11,825 | 11,815 |
| Health & Educational Services | 22,585 | 29,920 | 20,935 | 20,330 | 21,685 | 23,125 | 25,055 | 28,015 | 29,680 |
| Arts, Recreation & Other Services | 22,090 | 24,710 | 21,230 | 19,255 | 18,930 | 19,050 | 19,690 | 20,830 | 20,795 |
| Government | 20,125 | 21,060 | 24,710 | 23,255 | 23,645 | 23,985 | 24,140 | 23,280 | 22,095 |
| Total Jobs | 131,845 | 154,970 | 130,245 | 130,765 | 133,275 | 137,145 | 142,450 | 149,185 | 151,035 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## Projected Age Distribution, Solano

Source: ABAG / MTC Plan Bay Area data

## COUNTY OVERVIEW

Solano County has a large share of the region's important farmland and wetlands, although the county has been urbanizing over the last several decades. The county has experienced substantial growth in the retail sector, with shopping centers located near Interstate 80, serving the growing local population as well as people passing between other parts of the Bay Area and Sacramento. Solano County is also home to Travis Air Force Base and tourist attractions such as Six Flags amusement park, and redevelopment has occurred on the former Mare Island Naval Shipyard.

The population is concentrated in the central and southern parts of the county. The cities of Vallejo and Benicia are located in the southern portion of the county adjacent to the delta, while Fairfield, Vacaville and Suisun City are clustered in the center. The small towns of Dixon and Rio Vista are located in the northern and eastern portion of the county, respectively.

Rail transit in Solano County is provided by the Capitol Corridor. Two stations now exist in Solano County—Suisun City/Fairfield Station and Fairfield-Vacaville Station. Additional stations have been proposed in Benicia, Northern Fairfield/Vacaville and Dixon. Ferry service to San Francisco is currently available from Vallejo.

## POPULATION

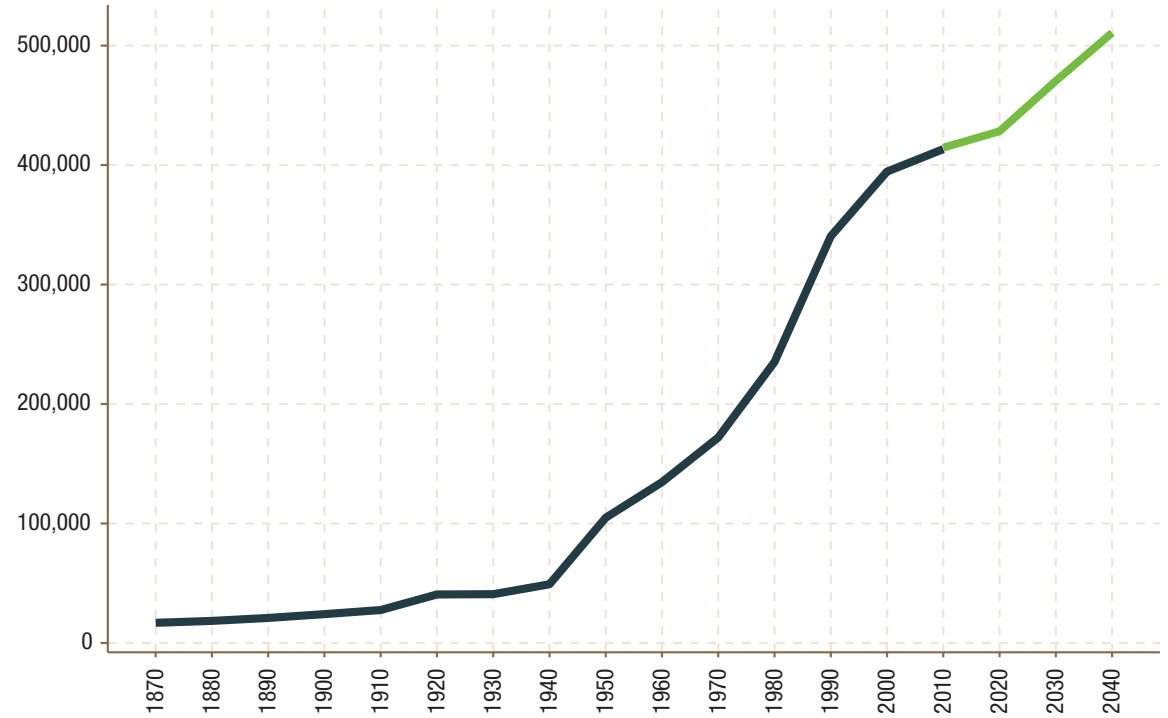
Solano County's population, by 2010 counted at 413,000, is projected to increase by 23 percent or 96,100 residents between 2010 and 2040. The three largest cities in the county — Vallejo, Fairfield and Vacaville — are projected to assume over half of

the county's almost 28,000 new households. Vallejo will have over 6,000 new households, Fairfield will add about 5,700 households while Vacaville is projected to see an additional 2,500 households. The City of Rio Vista will also see a dramatic change. In fact, Rio Vista is expected to have a more than 80 percent growth in households between 2010 and 2040, and to double its population. Rio Vista's projected household growth, at 2,850, is higher than the household growth projected for Vacaville. Household growth is projected to double in unincorporated Solano County, the fastest rate of household growth within the county, accounting for 23 percent of new household growth.

## ECONOMY

Solano County's economy has historically been based upon the manufacturing, distribution, food processing, warehousing and transportation industries as well as federal defense employment. Major employers include the Budweiser brewery, Jelly Belly candy factory, Genentech and the Valero oil refinery. Travis Air Force Base has also been important to the economy, handling more cargo and passengers than any other military air terminal in the country. As a result, the county has above average shares in the Retail and Government sectors with 14 and 20 percent respectively (compared to 10 and 15 percent region-wide). In addition, Solano County provides a critical link to the important and growing Sacramento area. The I-80 highway and the railroad line running parallel have shaped the economy of the county.

### Historic and Projected Population, Solano




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

Employment in Solano County is expected to grow by 16 percent between 2010 and 2040, or 20,850 new jobs. Fairfield is expected to take on 33 percent of the county-wide job growth, highest in the county. Most of the employment growth, 93 percent, is expected to occur in four cities: Benicia, Fairfield, Vacaville and Vallejo (including adjacent Mare Island). With its location between the metropolitan centers of San Francisco and Sacramento and its lower land prices relative to other parts of the region, the county has been an attractive place for lower-cost housing development in recent decades. Solano County is projected to absorb about three percent of the region's total household growth and two percent of its job growth, and future growth is expected to be clustered in the 11 locally adopted PDAs in Solano County, in the downtown areas and around Amtrak stations, revitalizing and transforming these areas into transit-oriented, pedestrian-friendly, mixed-use communities with an array of housing choices.

# Data Tables for Solano County

## SOLANO POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 26,995 | 27,435 | 27,090 | 26,985 | 27,570 | 28,275 | 29,060 | 29,385 | 30,735 |
| Dixon | 18,350 | 18,910 | 18,380 | 17,575 | 18,135 | 18,935 | 19,740 | 22,460 | 23,520 |
| Fairfield | 105,320 | 111,485 | 105,065 | 103,845 | 106,815 | 111,485 | 119,980 | 122,010 | 126,900 |
| Rio Vista | 7,360 | 8,235 | 6,535 | 7,350 | 7,705 | 8,080 | 8,700 | 11,665 | 14,630 |
| Suisun City | 28,110 | 28,900 | 27,820 | 27,255 | 28,130 | 28,995 | 29,745 | 30,845 | 31,670 |
| Vacaville | 92,430 | 95,265 | 93,040 | 89,930 | 92,735 | 96,050 | 101,160 | 101,950 | 105,065 |
| Vallejo | 115,940 | 117,435 | 116,660 | 119,585 | 122,225 | 125,140 | 128,625 | 132,215 | 139,160 |
| Unincorporated | 18,835 | 19,455 | 19,995 | 21,940 | 24,990 | 32,925 | 33,485 | 36,305 | 38,980 |
| County | 413,345 | 427,120 | 414,585 | 414,465 | 428,305 | 449,890 | 470,495 | 486,840 | 510,660 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SOLANO HOUSEHOLD POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 26,970 | 27,410 | 27,065 | 26,960 | 27,540 | 28,240 | 29,025 | 29,350 | 30,700 |
| Dixon | 18,350 | 18,910 | 18,380 | 17,575 | 18,135 | 18,935 | 19,735 | 22,460 | 23,520 |
| Fairfield | 102,830 | 108,880 | 102,615 | 101,295 | 104,145 | 108,680 | 117,015 | 118,900 | 123,610 |
| Rio Vista | 7,355 | 8,230 | 6,435 | 7,250 | 7,600 | 7,965 | 8,580 | 11,535 | 14,485 |
| Suisun City | 28,065 | 28,855 | 27,780 | 27,215 | 28,085 | 28,950 | 29,695 | 30,795 | 31,615 |
| Vacaville | 84,405 | 89,035 | 85,010 | 81,435 | 83,750 | 86,550 | 91,115 | 91,320 | 93,820 |
| Vallejo | 114,280 | 115,485 | 115,015 | 117,845 | 120,395 | 123,195 | 126,570 | 130,040 | 136,860 |
| Unincorporated | 18,630 | 19,265 | 19,855 | 21,790 | 24,820 | 32,730 | 33,285 | 36,100 | 38,775 |
| County | 400,890 | 416,070 | 402,160 | 401,365 | 414,465 | 435,250 | 455,025 | 470,490 | 493,380 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SOLANO HOUSEHOLDS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 10,685 | 10,780 | 10,685 | 10,615 | 10,845 | 11,130 | 11,400 | 11,425 | 11,865 |
| Dixon | 5,855 | 5,995 | 5,855 | 5,575 | 5,760 | 6,010 | 6,240 | 7,025 | 7,275 |
| Fairfield | 34,485 | 36,300 | 34,485 | 33,825 | 34,785 | 36,290 | 38,770 | 39,045 | 40,205 |
| Rio Vista | 3,455 | 3,835 | 3,455 | 3,285 | 3,475 | 3,660 | 3,870 | 5,130 | 6,300 |
| Suisun City | 8,920 | 9,105 | 8,920 | 8,690 | 8,985 | 9,250 | 9,460 | 9,725 | 10,010 |
| Vacaville | 31,090 | 32,560 | 31,090 | 29,720 | 30,585 | 31,585 | 33,300 | 33,045 | 33,585 |
| Vallejo | 40,560 | 40,695 | 40,560 | 41,415 | 42,375 | 43,370 | 44,430 | 45,135 | 46,865 |
| Unincorporated | 6,710 | 6,885 | 6,710 | 7,985 | 9,070 | 11,885 | 11,910 | 12,825 | 13,265 |
| County | 141,760 | 146,155 | 141,760 | 141,105 | 145,880 | 153,180 | 159,380 | 163,360 | 169,365 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SOLANO PERSONS PER HOUSEHOLD

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 2.52 | 2.54 | 2.53 | 2.54 | 2.54 | 2.54 | 2.55 | 2.57 | 2.59 |
| Dixon | 3.13 | 3.16 | 3.14 | 3.15 | 3.15 | 3.15 | 3.16 | 3.20 | 3.23 |
| Fairfield | 2.98 | 3.00 | 2.98 | 2.99 | 2.99 | 2.99 | 3.02 | 3.04 | 3.07 |
| Rio Vista | 2.13 | 2.15 | 1.86 | 2.21 | 2.19 | 2.18 | 2.22 | 2.25 | 2.30 |
| Suisun City | 3.15 | 3.17 | 3.12 | 3.13 | 3.13 | 3.13 | 3.14 | 3.17 | 3.16 |
| Vacaville | 2.71 | 2.73 | 2.73 | 2.74 | 2.74 | 2.74 | 2.74 | 2.76 | 2.79 |
| Vallejo | 2.82 | 2.84 | 2.84 | 2.85 | 2.84 | 2.84 | 2.85 | 2.88 | 2.92 |
| Unincorporated | 2.78 | 2.80 | 2.96 | 2.73 | 2.74 | 2.75 | 2.79 | 2.81 | 2.92 |
| County | 2.83 | 2.85 | 2.84 | 2.84 | 2.84 | 2.84 | 2.85 | 2.88 | 2.91 |

Source: Calculated from Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SOLANO EMPLOYED RESIDENTS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 13,590 | 14,280 | 14,670 | 16,450 | 16,575 | 16,700 | 16,875 | 16,695 | 17,140 |
| Dixon | 8,775 | 9,175 | 8,815 | 9,170 | 9,230 | 9,355 | 9,440 | 10,580 | 10,675 |
| Fairfield | 49,615 | 52,025 | 48,535 | 52,770 | 53,150 | 54,030 | 56,895 | 56,540 | 57,160 |
| Rio Vista | 2,495 | 2,925 | 2,085 | 2,670 | 2,775 | 2,870 | 3,040 | 3,990 | 4,880 |
| Suisun City | 13,445 | 14,510 | 13,450 | 14,335 | 14,440 | 14,475 | 14,425 | 14,570 | 14,650 |
| Vacaville | 41,235 | 43,630 | 45,965 | 48,925 | 49,265 | 49,755 | 51,045 | 49,930 | 49,995 |
| Vallejo | 51,635 | 54,945 | 57,530 | 65,475 | 66,000 | 66,285 | 66,750 | 66,935 | 68,850 |
| Unincorporated | 8,780 | 9,090 | 9,740 | 11,940 | 13,405 | 17,525 | 17,405 | 18,515 | 19,140 |
| County | 189,565 | 200,570 | 200,780 | 221,745 | 224,840 | 230,995 | 235,875 | 237,755 | 242,485 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## SOLANO TOTAL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 12,815 | 13,960 | 12,840 | 13,820 | 14,550 | 15,990 | 16,655 | 17,050 | 17,080 |
| Dixon | 5,545 | 5,380 | 4,845 | 4,450 | 4,460 | 4,485 | 4,650 | 5,180 | 5,395 |
| Fairfield | 40,230 | 41,410 | 43,170 | 42,785 | 43,660 | 44,920 | 47,105 | 49,415 | 50,035 |
| Rio Vista | 1,670 | 1,810 | 2,350 | 2,360 | 2,365 | 2,370 | 2,385 | 2,455 | 2,520 |
| Suisun City | 3,100 | 3,175 | 2,505 | 2,600 | 2,595 | 2,620 | 2,685 | 2,825 | 2,860 |
| Vacaville | 29,465 | 35,190 | 29,315 | 28,700 | 29,190 | 29,755 | 31,145 | 33,030 | 33,555 |
| Vallejo | 33,435 | 33,710 | 30,900 | 31,965 | 32,325 | 32,770 | 33,570 | 34,755 | 35,035 |
| Unincorporated | 5,580 | 20,340 | 4,240 | 4,050 | 4,080 | 4,195 | 4,220 | 4,440 | 4,510 |
| County | 131,845 | 154,970 | 130,160 | 130,730 | 133,230 | 137,105 | 142,410 | 149,150 | 150,995 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SOLANO AGRICULTURE AND NATURAL RESOURCES JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 60 | 50 | 5 | 25 | 25 | 30 | 30 | 30 | 30 |
| Dixon | 340 | 510 | 85 | 100 | 100 | 100 | 100 | 100 | 100 |
| Fairfield | 10 | 10 | 185 | 250 | 250 | 250 | 245 | 250 | 250 |
| Rio Vista | 265 | 225 | 415 | 405 | 405 | 405 | 405 | 400 | 400 |
| Suisun City | 5 | 0 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| Vacaville | 20 | 30 | 305 | 335 | 335 | 335 | 340 | 345 | 350 |
| Vallejo | 80 | 70 | 110 | 115 | 120 | 120 | 120 | 120 | 120 |
| Unincorporated | 505 | 960 | 695 | 695 | 695 | 700 | 700 | 705 | 710 |
| County | 1,295 | 1,985 | 1,815 | 1,935 | 1,945 | 1,955 | 1,950 | 1,970 | 1,975 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SOLANO MANUFACTURING, WHOLESALE AND TRANSPORTATION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 4,570 | 4,925 | 4,385 | 4,765 | 5,215 | 5,760 | 6,055 | 6,210 | 6,195 |
| Dixon | 1,265 | 1,070 | 1,210 | 1,040 | 1,030 | 1,030 | 1,050 | 1,170 | 1,210 |
| Fairfield | 6,150 | 6,375 | 6,620 | 6,525 | 6,825 | 7,155 | 7,670 | 8,465 | 8,735 |
| Rio Vista | 200 | 100 | 430 | 435 | 430 | 435 | 430 | 430 | 430 |
| Suisun City | 230 | 105 | 160 | 155 | 145 | 140 | 140 | 135 | 150 |
| Vacaville | 4,295 | 6,195 | 3,455 | 3,245 | 3,355 | 3,510 | 3,765 | 4,230 | 4,430 |
| Vallejo | 1,340 | 1,930 | 1,600 | 1,705 | 1,840 | 2,000 | 2,180 | 2,385 | 2,525 |
| Unincorporated | 360 | 1,000 | 1,010 | 825 | 790 | 755 | 755 | 785 | 795 |
| County | 18,280 | 21,670 | 18,870 | 18,695 | 19,635 | 20,780 | 22,050 | 23,810 | 24,475 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SOLANO RETAIL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 650 | 780 | 710 | 820 | 845 | 785 | 755 | 740 | 750 |
| Dixon | 1,280 | 1,180 | 550 | 580 | 610 | 590 | 580 | 625 | 650 |
| Fairfield | 5,250 | 6,165 | 5,385 | 5,700 | 5,760 | 5,890 | 6,060 | 6,035 | 6,070 |
| Rio Vista | 205 | 220 | 255 | 255 | 255 | 255 | 265 | 335 | 400 |
| Suisun City | 540 | 1,040 | 230 | 540 | 560 | 565 | 560 | 560 | 570 |
| Vacaville | 5,905 | 6,145 | 5,040 | 5,150 | 5,265 | 5,290 | 5,355 | 5,235 | 5,220 |
| Vallejo | 4,470 | 4,645 | 4,175 | 4,550 | 4,560 | 4,600 | 4,560 | 4,540 | 4,590 |
| Unincorporated | 135 | 1,360 | 290 | 495 | 575 | 730 | 710 | 740 | 760 |
| County | 17,950 | 20,985 | 16,630 | 18,090 | 18,430 | 18,710 | 18,845 | 18,810 | 19,015 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SOLANO FINANCIAL AND PROFESSIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 2,660 | 2,925 | 1,890 | 1,900 | 1,850 | 2,195 | 2,265 | 2,345 | 2,325 |
| Dixon | 515 | 585 | 440 | 395 | 375 | 350 | 340 | 350 | 330 |
| Fairfield | 8,540 | 5,715 | 4,485 | 5,165 | 5,165 | 5,260 | 5,535 | 5,900 | 5,900 |
| Rio Vista | 115 | 80 | 185 | 190 | 190 | 190 | 190 | 190 | 190 |
| Suisun City | 555 | 375 | 420 | 380 | 350 | 340 | 320 | 300 | 280 |
| Vacaville | 2,550 | 2,910 | 3,405 | 3,365 | 3,290 | 3,175 | 3,180 | 3,225 | 3,105 |
| Vallejo | 2,990 | 2,355 | 4,830 | 5,295 | 5,180 | 5,005 | 4,930 | 4,960 | 4,825 |
| Unincorporated | 755 | 3,885 | 510 | 490 | 465 | 445 | 430 | 415 | 400 |
| County | 18,450 | 18,945 | 16,165 | 17,190 | 16,870 | 16,960 | 17,190 | 17,685 | 17,355 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SOLANO HEALTH, EDUCATIONAL AND RECREATIONAL SERVICE JOBS

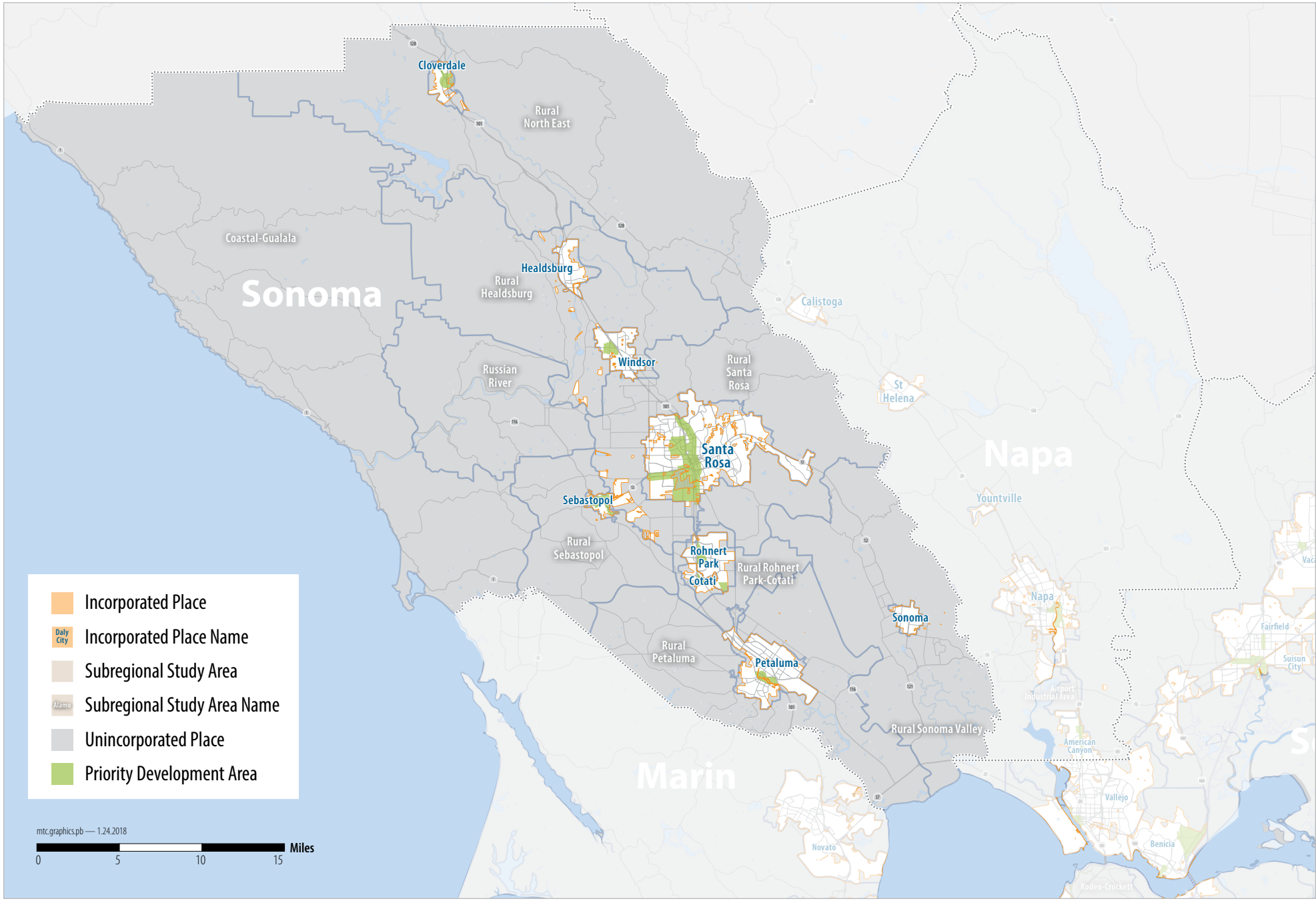
| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 2,390 | 2,445 | 2,370 | 2,420 | 2,575 | 3,045 | 3,345 | 3,735 | 3,950 |
| Dixon | 985 | 1,120 | 1,735 | 1,520 | 1,490 | 1,470 | 1,500 | 1,650 | 1,675 |
| Fairfield | 10,945 | 12,855 | 13,175 | 12,075 | 12,610 | 13,250 | 14,240 | 15,455 | 16,080 |
| Rio Vista | 425 | 335 | 450 | 445 | 450 | 455 | 455 | 460 | 460 |
| Suisun City | 1,020 | 1,080 | 1,055 | 920 | 910 | 925 | 970 | 1,085 | 1,080 |
| Vacaville | 8,710 | 11,305 | 10,670 | 9,890 | 10,050 | 10,260 | 10,855 | 11,960 | 12,300 |
| Vallejo | 17,980 | 18,525 | 12,045 | 11,700 | 11,880 | 12,105 | 12,650 | 13,665 | 14,035 |
| Unincorporated | 2,405 | 7,450 | 665 | 615 | 645 | 670 | 730 | 845 | 895 |
| County | 44,675 | 54,630 | 42,165 | 39,585 | 40,610 | 42,175 | 44,745 | 48,845 | 50,475 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SOLANO INFORMATION, GOVERNMENT AND CONSTRUCTION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Benicia | 2,485 | 2,830 | 3,475 | 3,885 | 4,035 | 4,175 | 4,205 | 3,990 | 3,820 |
| Dixon | 1,160 | 915 | 825 | 815 | 855 | 940 | 1,085 | 1,290 | 1,430 |
| Fairfield | 9,340 | 10,285 | 13,320 | 13,070 | 13,050 | 13,115 | 13,355 | 13,315 | 13,000 |
| Rio Vista | 465 | 845 | 620 | 630 | 630 | 635 | 635 | 635 | 640 |
| Suisun City | 750 | 570 | 625 | 595 | 615 | 640 | 685 | 730 | 770 |
| Vacaville | 7,990 | 8,605 | 6,440 | 6,710 | 6,895 | 7,185 | 7,650 | 8,030 | 8,150 |
| Vallejo | 6,575 | 6,185 | 8,140 | 8,595 | 8,745 | 8,935 | 9,130 | 9,090 | 8,940 |
| Unincorporated | 1,420 | 5,685 | 1,065 | 930 | 910 | 900 | 890 | 945 | 950 |
| County | 31,190 | 36,750 | 34,515 | 35,235 | 35,735 | 36,525 | 37,630 | 38,025 | 37,700 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.


Cloverdale
Rural North East
Coastal-Gualala
Sonoma
Healdsburg
Rural Healdsburg
Windsor
Russian River
Rural Santa Rosa
Calistoga
St Helena
Napa
Santa Rosa
Sebastopol
Yountville
Rural Sebastopol
Rohnert Park
Cotati
Rural Rohnert Park-Cotati
Sonoma
Napa
Fairfield
Suisun City
Rural Petaluma
Petaluma
Airport Industrial Area
Rural Sonoma Valley
American Canyon
Marin
Vallejo
Benicia
Novato
Rodeo-Crockett
Incorporated Place
Daly City
Incorporated Place Name
Subregional Study Area
Alamo
Subregional Study Area Name
Unincorporated Place
Priority Development Area
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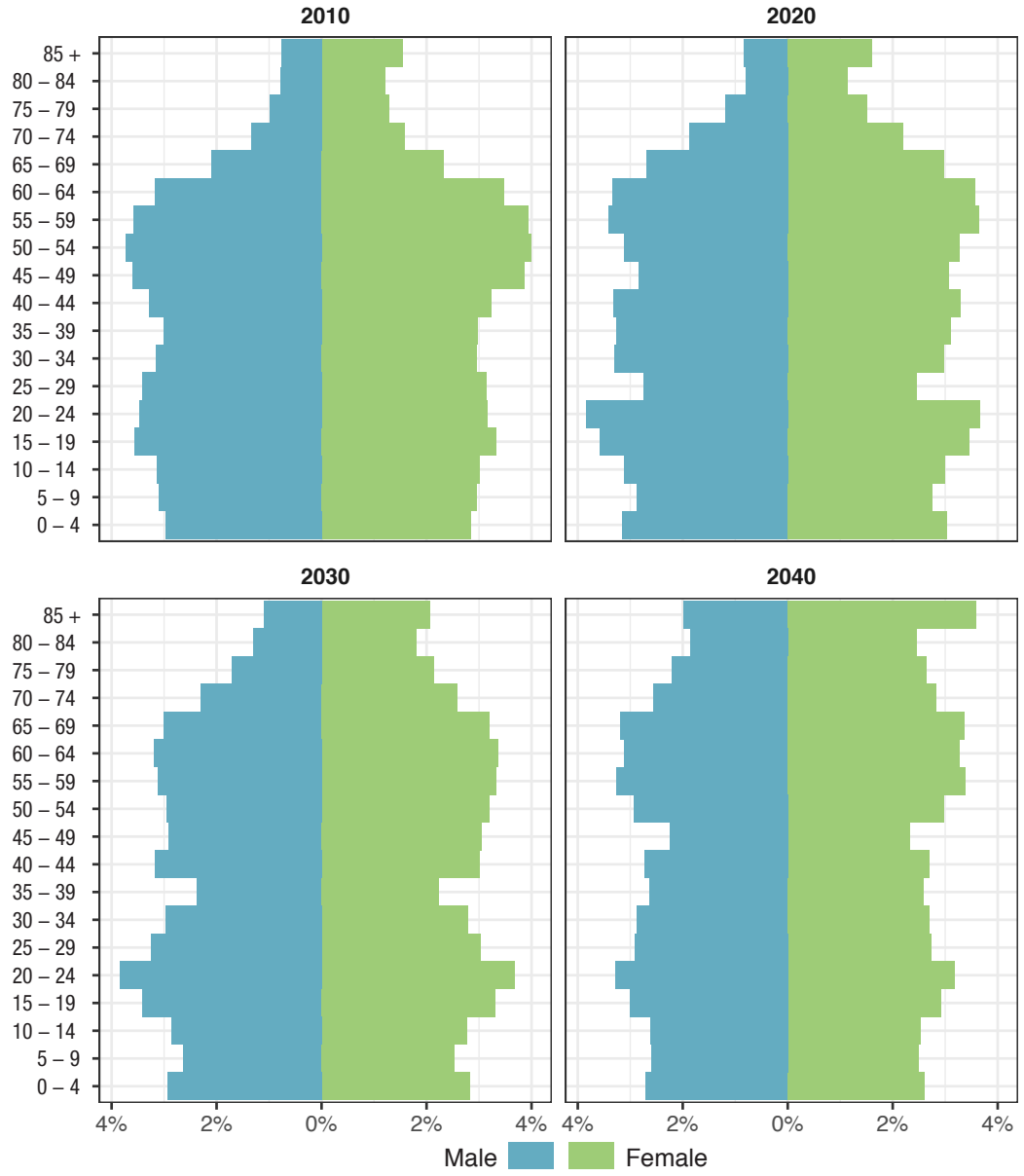
# Sonoma County

## SONOMA DATA SUMMARY

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Population | 483,880 | 500,050 | 484,990 | 483,885 | 502,015 | 528,820 | 561,360 | 581,560 | 597,505 |
| Household Population | 473,835 | 489,615 | 475,305 | 473,680 | 491,230 | 517,410 | 549,290 | 568,810 | 584,045 |
| Households | 185,825 | 190,485 | 185,825 | 183,475 | 190,660 | 200,510 | 211,100 | 216,155 | 219,060 |
| Persons per Household | 2.55 | 2.57 | 2.56 | 2.58 | 2.58 | 2.58 | 2.60 | 2.63 | 2.67 |
| Employed Residents | 233,200 | 250,010 | 240,345 | 265,500 | 269,375 | 276,420 | 284,620 | 287,085 | 286,490 |
| Agriculture & Natural Resources | 4,695 | 6,370 | 6,290 | 6,530 | 6,490 | 6,430 | 6,375 | 6,340 | 6,275 |
| Construction | 8,975 | 11,465 | 16,205 | 20,945 | 22,295 | 23,720 | 25,645 | 28,105 | 29,990 |
| Manufacturing & Wholesale | 24,175 | 26,015 | 28,440 | 26,305 | 25,590 | 25,000 | 24,440 | 24,015 | 23,485 |
| Retail | 25,110 | 28,495 | 23,255 | 24,225 | 24,325 | 24,880 | 25,295 | 25,335 | 25,280 |
| Transportation & Utilities | 4,195 | 4,160 | 4,835 | 4,720 | 4,710 | 4,605 | 4,640 | 4,795 | 4,975 |
| Information | 2,630 | 2,865 | 4,730 | 6,715 | 6,740 | 6,855 | 6,990 | 6,735 | 6,410 |
| Financial & Leasing | 9,070 | 9,375 | 8,500 | 8,660 | 8,490 | 7,940 | 7,475 | 7,105 | 6,735 |
| Professional & Managerial Services | 20,535 | 19,375 | 26,665 | 30,365 | 29,875 | 29,850 | 30,050 | 30,420 | 30,520 |
| Health & Educational Services | 28,700 | 38,430 | 30,675 | 34,260 | 37,855 | 40,805 | 44,150 | 48,615 | 52,055 |
| Arts, Recreation & Other Services | 36,590 | 41,395 | 30,645 | 31,755 | 32,305 | 32,805 | 33,790 | 35,240 | 35,570 |
| Government | 27,120 | 30,830 | 22,340 | 22,780 | 24,160 | 24,955 | 25,035 | 23,685 | 22,280 |
| Total Jobs | 191,795 | 218,775 | 202,580 | 217,260 | 222,835 | 227,850 | 233,890 | 240,390 | 243,575 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public estimates for population and household counts are from California Department of Finance E-5 Population and Housing Estimates for Cities. Employment is wage and salary counts, plus self-employment. Public estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528. **Note that modeled and public data come from different sources and industry employment are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## Projected Age Distribution, Sonoma




Source: ABAG / MTC Plan Bay Area data

## COUNTY OVERVIEW

Sonoma County is the largest in land area, and northernmost county of the Bay Area. The county has a variety of subareas, including urban, suburban and rural areas, the pacific coast, redwood forests, wetlands, small farms, but also the fifth largest city in the region. Urban development in Sonoma County is concentrated within cities along the US Highway 101 corridor. Voter-approved urban growth boundaries and other policies have kept growth tethered to already developed areas and encouraged separation between cities and the county's scenic natural landscapes.

The introduction of Sonoma-Marin Area Rail Transit (SMART) has enhanced existing transit service in the county and improved connections between Sonoma's cities, destinations in Marin County, and regional employment centers via bus transit and ferry access to San Francisco. Stations are serving Cloverdale, Healdsburg, Windsor, Santa Rosa, Rohnert Park, Cotati, and Petaluma, and are located largely within Priority Development Areas (PDAs) with recently adopted station area plans.

## POPULATION

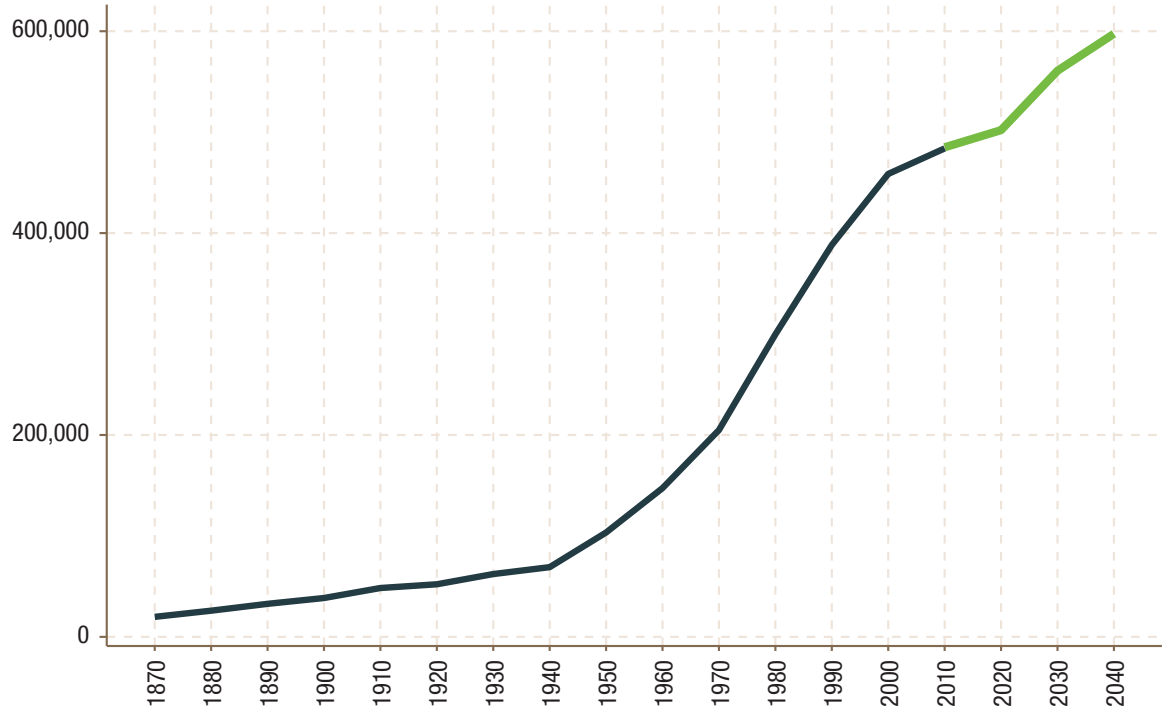
Sonoma County, with 483,000 people in 2010, is the biggest of the north bay counties. Its population is expected to grow by about 112,500 residents between 2010 and 2040, representing a 23 percent increase. The number of households in the county is expected to increase by 18 percent, or 33,200 households. With a population of 167,250 and 63,590 households in 2010, Santa Rosa is the largest city in Sonoma County and the fifth largest city in the

Bay Area. Santa Rosa's households will increase by 16,440 in the next thirty years for a total households of 80,030 by 2040, which represents almost half of the projected household growth in the county. Petaluma, the second largest city in Sonoma County, will add 2,760 households, and the city of Rohnert Park will increase by 33 percent or 5,220 new households during the same period. Together, almost three quarters of the projected household growth in the  will occur in these three cities. Meanwhile, Cloverdale and Cotati are projected to experience proportionately larger changes, increasing in new households by 53 percentage and 390 percent respectively.

## ECONOMY

Similar to Napa County, the wine industry has a very long history in Sonoma. In the second half of the 20th Century, the industry saw resurgence with the growing international reputation of California wine. Not only is wine production an important driver of the economy, but so is the associated tourism with wine tasting and visits to wine country. With its wine and scenic vistas, Sonoma County is a premier Bay Area tourist destination. According to the 2012 Tourism Report prepared by the Economic Development Board of Sonoma County, $1.35 billion was generated in 2010 by destination spending in the county and 16,540 jobs were supported by those dollars. Collectively, the three sectors most related to the wine industry (Agriculture and Natural Resources, Manufacturing and Wholesale, and Arts, Recreation and Other Services) make up 34 percent of all the jobs in Sonoma County in 2010.

### Historic and Projected Population, Sonoma




Source: US Census Bureau for historic data; ABAG / MTC Plan Bay Area data for projected years

Between 2010 and 2040, Sonoma is projected to add over 40,850 new jobs. New jobs are expected to be concentrated in Petaluma, Santa Rosa and the unincorporated areas. Santa Rosa is in turn expected to add about 15,500 new jobs, highest in the county, followed by the unincorporated area, where around 10,100 additional jobs are projected, and Petaluma with 9,800 new jobs. Overall, Sonoma County is projected to assume four percent of regional household growth and three percent of Bay Area job growth between 2010 and 2040. The County will focus the majority of future development in its central cities along the SMART corridor, particularly in the 12 locally designated PDAs. This growth pattern will focus future development away from open space areas and toward developed areas, and provide housing and job choices near transit.

# Data Tables for Sonoma County

## SONOMA POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 8,620 | 8,810 | 8,690 | 8,615 | 11,925 | 12,440 | 13,195 | 13,320 | 13,635 |
| Cotati | 7,265 | 7,230 | 7,615 | 7,635 | 7,945 | 8,490 | 9,475 | 9,695 | 10,770 |
| Healdsburg | 11,255 | 11,720 | 11,335 | 10,445 | 10,970 | 11,325 | 11,895 | 12,235 | 12,375 |
| Petaluma | 57,940 | 60,040 | 58,075 | 59,425 | 60,830 | 63,455 | 64,795 | 65,970 | 67,390 |
| Rohnert Park | 40,795 | 41,755 | 42,840 | 47,215 | 47,845 | 50,220 | 52,720 | 53,895 | 56,050 |
| Santa Rosa | 167,815 | 174,590 | 167,220 | 168,850 | 173,305 | 186,445 | 204,795 | 213,615 | 223,060 |
| Sebastopol | 7,380 | 7,530 | 7,715 | 7,250 | 7,640 | 8,285 | 8,905 | 9,180 | 9,360 |
| Sonoma | 10,650 | 10,895 | 10,795 | 10,430 | 10,880 | 11,235 | 11,570 | 11,675 | 11,905 |
| Windsor | 26,800 | 27,170 | 26,610 | 25,175 | 26,170 | 27,160 | 28,345 | 32,550 | 32,805 |
| Unincorporated | 145,365 | 150,315 | 144,095 | 138,845 | 144,500 | 149,765 | 155,665 | 159,425 | 160,150 |
| County | 483,880 | 500,050 | 484,990 | 483,885 | 502,015 | 528,820 | 561,360 | 581,560 | 597,505 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SONOMA HOUSEHOLD POPULATION

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 8,530 | 8,720 | 8,590 | 8,510 | 11,810 | 12,315 | 13,065 | 13,185 | 13,495 |
| Cotati | 7,255 | 7,220 | 7,485 | 7,500 | 7,800 | 8,335 | 9,315 | 9,525 | 10,590 |
| Healdsburg | 11,200 | 11,665 | 11,175 | 10,275 | 10,795 | 11,140 | 11,695 | 12,025 | 12,150 |
| Petaluma | 57,215 | 59,315 | 57,365 | 58,670 | 60,035 | 62,610 | 63,900 | 65,025 | 66,390 |
| Rohnert Park | 40,575 | 41,710 | 40,475 | 44,705 | 45,190 | 47,415 | 49,745 | 50,745 | 52,720 |
| Santa Rosa | 164,405 | 171,130 | 163,920 | 165,385 | 169,655 | 182,575 | 200,680 | 209,270 | 218,480 |
| Sebastopol | 7,250 | 7,405 | 7,615 | 7,150 | 7,530 | 8,160 | 8,775 | 9,040 | 9,210 |
| Sonoma | 10,410 | 10,660 | 10,565 | 10,185 | 10,625 | 10,960 | 11,280 | 11,370 | 11,580 |
| Windsor | 26,750 | 27,120 | 26,515 | 25,075 | 26,060 | 27,050 | 28,225 | 32,425 | 32,670 |
| Unincorporated | 140,245 | 144,675 | 141,600 | 136,225 | 141,735 | 146,845 | 152,605 | 156,205 | 156,760 |
| County | 473,835 | 489,615 | 475,305 | 473,680 | 491,230 | 517,410 | 549,290 | 568,810 | 584,045 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SONOMA HOUSEHOLDS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 3,180 | 3,225 | 3,180 | 3,175 | 4,380 | 4,550 | 4,795 | 4,800 | 4,855 |
| Cotati | 2,980 | 2,940 | 2,980 | 2,925 | 3,065 | 3,275 | 3,650 | 3,735 | 4,140 |
| Healdsburg | 4,380 | 4,525 | 4,385 | 4,020 | 4,230 | 4,355 | 4,555 | 4,615 | 4,620 |
| Petaluma | 21,735 | 22,355 | 21,735 | 22,200 | 22,740 | 23,735 | 24,080 | 24,275 | 24,490 |
| Rohnert Park | 15,810 | 16,125 | 15,810 | 17,455 | 17,665 | 18,570 | 19,395 | 20,470 | 21,030 |
| Santa Rosa | 63,590 | 65,670 | 63,590 | 63,225 | 64,995 | 69,755 | 75,630 | 77,815 | 80,035 |
| Sebastopol | 3,275 | 3,320 | 3,275 | 3,095 | 3,240 | 3,500 | 3,725 | 3,815 | 3,840 |
| Sonoma | 4,955 | 5,035 | 4,955 | 4,760 | 4,990 | 5,110 | 5,235 | 5,235 | 5,270 |
| Windsor | 8,970 | 9,020 | 8,960 | 8,445 | 8,800 | 9,125 | 9,465 | 10,830 | 10,770 |
| Unincorporated | 56,950 | 58,270 | 56,950 | 54,175 | 56,560 | 58,535 | 60,570 | 60,570 | 60,020 |
| County | 185,825 | 190,485 | 185,825 | 183,475 | 190,660 | 200,510 | 211,100 | 216,155 | 219,060 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SONOMA PERSONS PER HOUSEHOLD

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 2.68 | 2.70 | 2.70 | 2.68 | 2.70 | 2.71 | 2.72 | 2.75 | 2.78 |
| Cotati | 2.44 | 2.46 | 2.51 | 2.56 | 2.54 | 2.55 | 2.55 | 2.55 | 2.56 |
| Healdsburg | 2.56 | 2.58 | 2.55 | 2.56 | 2.55 | 2.56 | 2.57 | 2.60 | 2.63 |
| Petaluma | 2.63 | 2.65 | 2.64 | 2.64 | 2.64 | 2.64 | 2.65 | 2.68 | 2.71 |
| Rohnert Park | 2.57 | 2.59 | 2.56 | 2.56 | 2.56 | 2.55 | 2.57 | 2.48 | 2.51 |
| Santa Rosa | 2.59 | 2.61 | 2.58 | 2.62 | 2.61 | 2.62 | 2.65 | 2.69 | 2.73 |
| Sebastopol | 2.21 | 2.23 | 2.33 | 2.31 | 2.32 | 2.33 | 2.36 | 2.37 | 2.40 |
| Sonoma | 2.10 | 2.12 | 2.13 | 2.14 | 2.13 | 2.15 | 2.15 | 2.17 | 2.20 |
| Windsor | 2.98 | 3.01 | 2.96 | 2.97 | 2.96 | 2.96 | 2.98 | 2.99 | 3.03 |
| Unincorporated | 2.46 | 2.48 | 2.49 | 2.51 | 2.51 | 2.51 | 2.52 | 2.58 | 2.61 |
| County | 2.55 | 2.57 | 2.56 | 2.58 | 2.58 | 2.58 | 2.60 | 2.63 | 2.67 |

Source: Calculated from Model estimates from *Plan Bay Area 2040* data. Public Estimates from California Department of Finance E-5 Population and Housing Estimates for Cities.

## SONOMA EMPLOYED RESIDENTS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 3,780 | 4,295 | 3,355 | 3,605 | 4,870 | 4,965 | 5,015 | 4,825 | 4,720 |
| Cotati | 3,785 | 4,185 | 4,120 | 4,535 | 4,620 | 4,825 | 5,245 | 5,250 | 5,650 |
| Healdsburg | 5,335 | 5,840 | 5,075 | 5,135 | 5,225 | 5,215 | 5,315 | 5,315 | 5,225 |
| Petaluma | 29,775 | 30,705 | 29,290 | 33,180 | 33,460 | 34,245 | 34,285 | 34,045 | 33,940 |
| Rohnert Park | 21,135 | 22,670 | 24,010 | 29,375 | 29,175 | 29,905 | 30,485 | 30,365 | 30,680 |
| Santa Rosa | 78,490 | 85,940 | 79,710 | 88,755 | 89,190 | 93,220 | 99,025 | 100,510 | 101,775 |
| Sebastopol | 4,055 | 3,795 | 4,030 | 4,230 | 4,370 | 4,595 | 4,795 | 4,815 | 4,765 |
| Sonoma | 4,935 | 5,255 | 5,265 | 5,630 | 5,735 | 5,755 | 5,755 | 5,650 | 5,630 |
| Windsor | 12,805 | 13,965 | 12,045 | 12,455 | 12,635 | 12,750 | 12,860 | 14,335 | 14,015 |
| Unincorporated | 69,110 | 73,360 | 73,450 | 78,600 | 80,085 | 80,950 | 81,835 | 81,975 | 80,095 |
| County | 233,200 | 250,010 | 240,345 | 265,500 | 269,375 | 276,420 | 284,620 | 287,085 | 286,490 |

Source: Model estimates from *Plan Bay Area 2040* data. Public Estimates from American Community Survey, table B23025 (2010 represented using 2008-2012 sample; 2015 represented with 2013-2017 sample).

## SONOMA TOTAL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 1,610 | 1,915 | 1,710 | 1,870 | 2,005 | 2,030 | 2,085 | 2,090 | 2,095 |
| Cotati | 2,660 | 3,970 | 2,635 | 2,830 | 2,905 | 2,930 | 2,900 | 2,905 | 2,955 |
| Healdsburg | 6,230 | 6,875 | 8,330 | 8,775 | 8,860 | 8,915 | 8,980 | 8,975 | 8,985 |
| Petaluma | 24,950 | 29,965 | 29,995 | 32,650 | 33,440 | 34,330 | 35,460 | 36,795 | 39,840 |
| Rohnert Park | 13,120 | 13,145 | 12,135 | 13,155 | 13,040 | 13,355 | 13,535 | 13,705 | 13,900 |
| Santa Rosa | 73,795 | 81,250 | 76,570 | 83,640 | 86,205 | 88,155 | 90,425 | 92,580 | 92,060 |
| Sebastopol | 5,460 | 5,605 | 4,965 | 5,125 | 5,315 | 5,400 | 5,385 | 5,305 | 5,280 |
| Sonoma | 8,365 | 8,415 | 7,145 | 7,175 | 7,305 | 7,495 | 7,785 | 7,975 | 7,980 |
| Windsor | 6,475 | 7,485 | 7,715 | 8,120 | 8,330 | 8,485 | 8,565 | 8,805 | 8,895 |
| Unincorporated | 49,130 | 60,155 | 51,540 | 54,040 | 55,555 | 56,875 | 58,875 | 61,310 | 61,595 |
| County | 191,795 | 218,775 | 202,730 | 217,380 | 222,960 | 227,970 | 233,995 | 240,450 | 243,585 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SONOMA AGRICULTURE AND NATURAL RESOURCES JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 185 | 355 | 45 | 55 | 55 | 55 | 55 | 55 | 50 |
| Cotati | 0 | 0 | 20 | 30 | 30 | 30 | 30 | 30 | 30 |
| Healdsburg | 250 | 190 | 175 | 170 | 170 | 170 | 170 | 170 | 165 |
| Petaluma | 30 | 105 | 345 | 400 | 400 | 390 | 390 | 390 | 395 |
| Rohnert Park | 0 | 40 | 80 | 85 | 75 | 75 | 75 | 75 | 75 |
| Santa Rosa | 420 | 445 | 495 | 560 | 555 | 540 | 530 | 530 | 505 |
| Sebastopol | 0 | 25 | 45 | 45 | 45 | 50 | 45 | 40 | 40 |
| Sonoma | 190 | 295 | 165 | 170 | 175 | 170 | 165 | 165 | 165 |
| Windsor | 75 | 220 | 365 | 400 | 400 | 400 | 395 | 395 | 395 |
| Unincorporated | 3,840 | 4,770 | 4,555 | 4,610 | 4,585 | 4,555 | 4,525 | 4,490 | 4,445 |
| County | 4,695 | 6,370 | 6,290 | 6,530 | 6,490 | 6,430 | 6,375 | 6,340 | 6,275 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SONOMA MANUFACTURING, WHOLESALE AND TRANSPORTATION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 215 | 245 | 385 | 390 | 395 | 395 | 395 | 400 | 400 |
| Cotati | 465 | 465 | 400 | 440 | 450 | 450 | 450 | 455 | 455 |
| Healdsburg | 1,205 | 1,615 | 1,750 | 1,735 | 1,730 | 1,730 | 1,730 | 1,725 | 1,720 |
| Petaluma | 6,075 | 6,880 | 6,170 | 5,630 | 5,415 | 5,250 | 5,210 | 5,095 | 5,135 |
| Rohnert Park | 1,475 | 1,310 | 1,630 | 1,610 | 1,520 | 1,515 | 1,500 | 1,490 | 1,490 |
| Santa Rosa | 7,770 | 7,810 | 10,345 | 9,155 | 8,820 | 8,445 | 8,005 | 7,790 | 7,465 |
| Sebastopol | 470 | 535 | 515 | 500 | 515 | 515 | 505 | 495 | 490 |
| Sonoma | 265 | 675 | 550 | 485 | 475 | 450 | 435 | 410 | 390 |
| Windsor | 1,460 | 1,255 | 1,470 | 1,460 | 1,480 | 1,500 | 1,500 | 1,515 | 1,510 |
| Unincorporated | 8,800 | 9,200 | 10,080 | 9,640 | 9,515 | 9,370 | 9,375 | 9,470 | 9,440 |
| County | 28,370 | 30,175 | 33,295 | 31,050 | 30,325 | 29,625 | 29,105 | 28,845 | 28,495 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SONOMA RETAIL JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 215 | 205 | 165 | 170 | 230 | 235 | 245 | 245 | 250 |
| Cotati | 625 | 665 | 420 | 420 | 430 | 445 | 490 | 500 | 540 |
| Healdsburg | 940 | 860 | 945 | 1,410 | 1,480 | 1,525 | 1,585 | 1,600 | 1,610 |
| Petaluma | 3,300 | 4,225 | 3,900 | 4,165 | 4,160 | 4,275 | 4,275 | 4,240 | 4,210 |
| Rohnert Park | 2,520 | 2,280 | 1,850 | 2,220 | 2,200 | 2,305 | 2,365 | 2,455 | 2,520 |
| Santa Rosa | 11,035 | 12,465 | 8,785 | 9,225 | 9,290 | 9,750 | 10,270 | 10,400 | 10,490 |
| Sebastopol | 1,000 | 960 | 765 | 745 | 760 | 815 | 855 | 870 | 880 |
| Sonoma | 625 | 1,135 | 965 | 820 | 780 | 720 | 655 | 595 | 540 |
| Windsor | 1,035 | 1,345 | 880 | 880 | 895 | 900 | 920 | 1,020 | 1,040 |
| Unincorporated | 4,205 | 5,115 | 4,575 | 4,170 | 4,100 | 3,915 | 3,635 | 3,400 | 3,200 |
| County | 25,110 | 28,495 | 23,255 | 24,225 | 24,325 | 24,880 | 25,295 | 25,335 | 25,280 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SONOMA FINANCIAL AND PROFESSIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 165 | 115 | 205 | 205 | 205 | 210 | 215 | 210 | 210 |
| Cotati | 230 | 235 | 465 | 490 | 490 | 485 | 460 | 455 | 455 |
| Healdsburg | 660 | 665 | 935 | 935 | 935 | 940 | 940 | 935 | 935 |
| Petaluma | 4,195 | 5,380 | 6,430 | 7,445 | 7,355 | 7,325 | 7,445 | 7,630 | 8,350 |
| Rohnert Park | 2,680 | 1,550 | 2,710 | 2,830 | 2,740 | 2,700 | 2,660 | 2,545 | 2,500 |
| Santa Rosa | 12,475 | 12,685 | 13,465 | 15,160 | 14,840 | 14,460 | 14,155 | 14,105 | 13,420 |
| Sebastopol | 640 | 680 | 670 | 745 | 770 | 765 | 750 | 740 | 730 |
| Sonoma | 3,990 | 1,635 | 1,240 | 1,270 | 1,230 | 1,195 | 1,170 | 1,165 | 1,120 |
| Windsor | 920 | 1,190 | 1,355 | 1,425 | 1,435 | 1,450 | 1,455 | 1,460 | 1,470 |
| Unincorporated | 4,470 | 4,320 | 7,690 | 8,535 | 8,365 | 8,260 | 8,275 | 8,280 | 8,065 |
| County | 29,605 | 28,750 | 35,165 | 39,030 | 38,370 | 37,795 | 37,530 | 37,530 | 37,260 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SONOMA HEALTH, EDUCATIONAL AND RECREATIONAL SERVICE JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 555 | 625 | 445 | 495 | 530 | 545 | 570 | 575 | 580 |
| Cotati | 825 | 1,880 | 740 | 775 | 800 | 810 | 790 | 790 | 795 |
| Healdsburg | 2,340 | 2,585 | 2,055 | 2,025 | 2,030 | 2,045 | 2,045 | 2,040 | 2,040 |
| Petaluma | 7,335 | 9,015 | 7,590 | 8,115 | 8,670 | 9,180 | 9,915 | 10,910 | 12,980 |
| Rohnert Park | 4,715 | 4,855 | 3,370 | 3,515 | 3,610 | 3,755 | 3,880 | 4,070 | 4,150 |
| Santa Rosa | 27,395 | 32,000 | 26,575 | 29,390 | 31,450 | 32,975 | 34,880 | 37,445 | 38,425 |
| Sebastopol | 2,235 | 2,165 | 2,005 | 2,020 | 2,110 | 2,125 | 2,090 | 2,045 | 2,030 |
| Sonoma | 2,500 | 3,550 | 3,040 | 3,045 | 3,180 | 3,350 | 3,625 | 3,925 | 4,050 |
| Windsor | 1,730 | 1,960 | 1,735 | 1,865 | 1,950 | 2,010 | 2,040 | 2,115 | 2,150 |
| Unincorporated | 15,980 | 22,495 | 13,765 | 14,775 | 15,825 | 16,815 | 18,110 | 19,945 | 20,425 |
| County | 65,290 | 79,825 | 61,320 | 66,015 | 70,160 | 73,610 | 77,940 | 83,855 | 87,625 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

## SONOMA INFORMATION, GOVERNMENT AND CONSTRUCTION JOBS

| | Public Data Estimates | | Plan Bay Area Model Estimates | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Jurisdiction | 2010 | 2015 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 |
| Cloverdale | 275 | 370 | 470 | 555 | 585 | 590 | 605 | 605 | 610 |
| Cotati | 510 | 725 | 590 | 680 | 700 | 710 | 675 | 675 | 680 |
| Healdsburg | 840 | 960 | 2,470 | 2,505 | 2,510 | 2,510 | 2,515 | 2,505 | 2,510 |
| Petaluma | 4,015 | 4,355 | 5,560 | 6,895 | 7,440 | 7,905 | 8,230 | 8,530 | 8,770 |
| Rohnert Park | 1,730 | 3,110 | 2,490 | 2,900 | 2,895 | 3,005 | 3,060 | 3,065 | 3,165 |
| Santa Rosa | 14,710 | 15,850 | 16,900 | 20,150 | 21,245 | 21,985 | 22,585 | 22,310 | 21,750 |
| Sebastopol | 1,110 | 1,240 | 965 | 1,070 | 1,115 | 1,130 | 1,135 | 1,115 | 1,110 |
| Sonoma | 795 | 1,120 | 1,185 | 1,385 | 1,470 | 1,605 | 1,735 | 1,715 | 1,715 |
| Windsor | 1,255 | 1,515 | 1,905 | 2,085 | 2,160 | 2,220 | 2,255 | 2,300 | 2,330 |
| Unincorporated | 11,840 | 14,255 | 10,875 | 12,310 | 13,170 | 13,960 | 14,960 | 15,725 | 16,015 |
| County | 38,725 | 45,160 | 43,405 | 50,530 | 53,290 | 55,625 | 57,745 | 58,550 | 58,655 |

Source: Model estimates from *Plan Bay Area 2040* model data. Public Estimates from Census Bureau data. Employment is wage and salary counts, plus self-employment. Public Estimates of wage and salary employment are tabulated from US Census Bureau LODES Workplace Area Characteristic data; self-employment from American Community Survey (ACS), table B08528, for workplace geography. **Modeled and public data come from different sources and are not directly comparable and may differ considerably even for larger geographical units.** See Methodology section (pp. 9-10) for further discussion of these differences.

# End Notes

1 See Association of Bay Area Governments and Metropolitan Transportation Commission. (2017). Plan Bay Area 2040: Final Regional Forecast of Jobs, Population and Housing. San Francisco, CA. Retrieved from http://2040.planbayarea.org/sites/default/files/2017-07/Regional Forecast Supplemental Report_Final_7-2017_0.pdf

2 See Association of Bay Area Governments and Metropolitan Transportation Commission. (2017). Plan Bay Area 2040: Final Land Use Modeling Report. San Francisco, CA. Retrieved from http://2040.planbayarea.org/sites/default/files/2017-07/Land_Use_Modeling_PBA2040_Supplemental Report_7-2017.pdf

3 See the Regional Forecast Supplemental Report cited in footnote 1 for a description of the in-commuting adjustment requirement and estimation process.

4 While the regional control total and the local allocation match for 2010 and 2040, there is a phasing difference between the two: the regional control tapers off after 2020 followed by slow growth through 2030, with an uptick then. The local allocation is more of a straight line growth, smoothing such differences.

5 In the electronic files, we refer to the end-of-year 2010 UrbanSim outputs as baseline A, and the pre-simulation baseline counts, tracking Census counts as baseline B. The former was used for the travel modeling work and is provided as a separate 2010 datapoint.

6 The Census Bureau, as a statistical agency, are bound by federal confidentiality protection laws, prohibiting disclosure of private information of businesses or persons. In the case of the LODES data, confidentiality is ensured using noise infusion and small cell imputation methods. These tend to be more notable in cases where a large employer accounts for the vast majority of jobs in a town or sector. For bigger cities, accordingly, this type of suppression is less of an issue, from a user standpoint.

7 This count is from the US Bureau of Economic Analysis for 2017 in current dollars and uses a slightly different Bay Area definition than the nine counties used in the projections. This figure covers Napa, CA (Metropolitan Statistical Area); San Francisco-Oakland-Hayward, CA (Metropolitan Statistical Area); San Jose-Sunnyvale-Santa Clara, CA (Metropolitan Statistical Area); Santa Rosa, CA (Metropolitan Statistical Area), and Vallejo-Fairfield, CA (Metropolitan Statistical Area)..

8 Per the 2015 public data estimates, Napa had grown much faster than expected, to a total of 82,000 jobs.

9 Estimate is per 2017 California Department of Finance E-5 figures.

## Management Staff

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