San Francisco Bay Area Population Change

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How Many People?

• 2 of the 15 fastest growing US cities are in the Bay Area, and 1 of the top 15 numerical gainers.
• Regionwide changes versus local changes, employment spurs people, impact of people.
• San Francisco’s population is booming—is migration turning around?
• What if your county or jurisdiction doesn’t want to grow? Who is moving into all of those houses?
• Which forces will shape the future? What balance will be reached between growth pressures and growth controls?
Intro to the San Francisco Bay Area

- 109 jurisdictions
- 7.4 million people
- 2.6 million households
- 3.6+ million jobs
- Between 2010 and 2013/2014
  - jobs grew by 9.8%
  - population by 3.8%
  - housing stock by 1.4%
Bay Area Population Trends 1990-2015

Source: ABAG from California Department of Finance E-5 Series to January 2015.
Across the Bay Area
Population Shares Change Gradually

Source: ABAG from California Department of Finance E-5 Series to January 2015.
Population—Annual Rate of Change by County, Decade

Source: ABAG from California Department of Finance Table E-5 series to January 2014.
The table shows the components of change in Bay Area population from 1999-00 to 2013-14. The data includes natural increase, international migration, and net domestic migration. The source of the data is ABAG from California Department of Finance Table E-2 series.
San Francisco Components of Change
California DOF Estimates

Source: ABAG from California Department of Finance Table E-2 series.
Marin County Components of Change
California DOF Estimates

![Graph showing components of change in Marin County from 1999-00 to 2013-14]

Source: ABAG from California Department of Finance Table E-2 series.
Contra Costa Components of Change
California DOF Estimates

Source: ABAG from California Department of Finance Table E-2 series.
Diversity is Happening Faster in Some Counties than Others

Source: ABAG from US Census ACS data
Getting Older—or Younger

Source: ABAG from US Census ACS data
In-Migration is Up, Outmigration Down

Source: ABAG from US Census ACS data
13% of Bay Area Population Had Moved Houses in the 2011-2013 Period

Here is Where They Went

People Who Moved From a Home in These Counties Went to...

- Same County
- Rest of Region
- Outside the Region

Source: ABAG from US Census ACS data
Here is Where People Changing Homes Came from between 2011 and 2013

People Who Moved into a Home in these Counties Came FROM...

- Same County
- Rest of Region
- From Outside

Source: ABAG from US Census ACS data
The Marginal Change in Population in the Bay Area Tends to be Small—1% or Less

Source: ABAG from Pitkin-Myers analysis and preliminary forecast.
Bay Area Population Forecasts Have Come Close

Source: ABAG from *Projections* series and California Department of Finance.
Bay Area Employment Forecasts are Harder

Source: ABAG from *Projections* series and BLS data.
*ABAG adjusted BLS to include proprietors and self employed. 2015 data is 10/2014.
County Forecasts Reflect Market, Policy
2015 Population Forecasts vs DOF Estimate

Source: ABAG from Projections series and California Department of Finance.
Critical Questions for the Forecast

- Will mortality rate of 85+ population decline?
- Will “young,” “mature,” and older seniors age in place, live with children, move to apartments?
- How will county population change as baby boomers sell their single family homes to new families?
- Will the economic surge continue, drawing in a global young workforce?
- Are millennials who have moved to the Bay Area there for the long haul; are their long-term preferences “different?” [urban living, fewer cars]
- Will changes in regional policy lead to greater housing growth, allowing more jobs and population? Can the infrastructure handle growth?
Thank you!

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