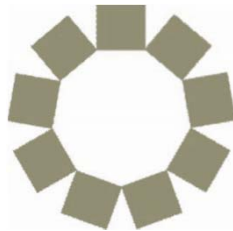


San Francisco Bay Area Population Change

Cynthia Kroll, Chief Economist
Association of Bay Area Governments
SCAG/USC-Price Demographic Workshop
Los Angeles, June 1, 2015



How Many People?

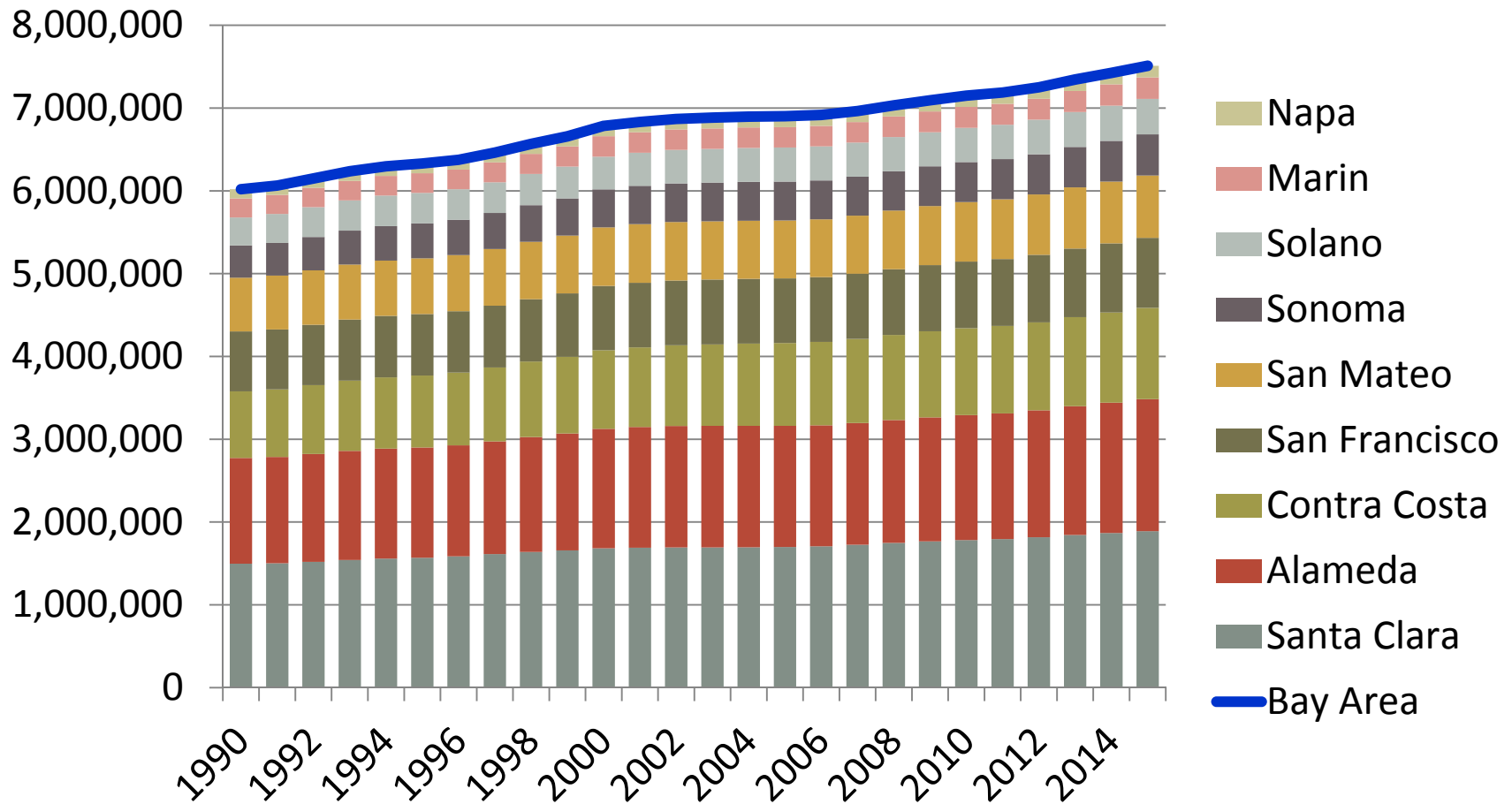
- 2 of the 15 fastest growing US cities are in the Bay Area, and 1 of the top 15 numerical gainers.
- Regionwide changes versus local changes, employment spurs people, impact of people.
- San Francisco's population is booming—is migration turning around?
- What if your county or jurisdiction doesn't *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%.

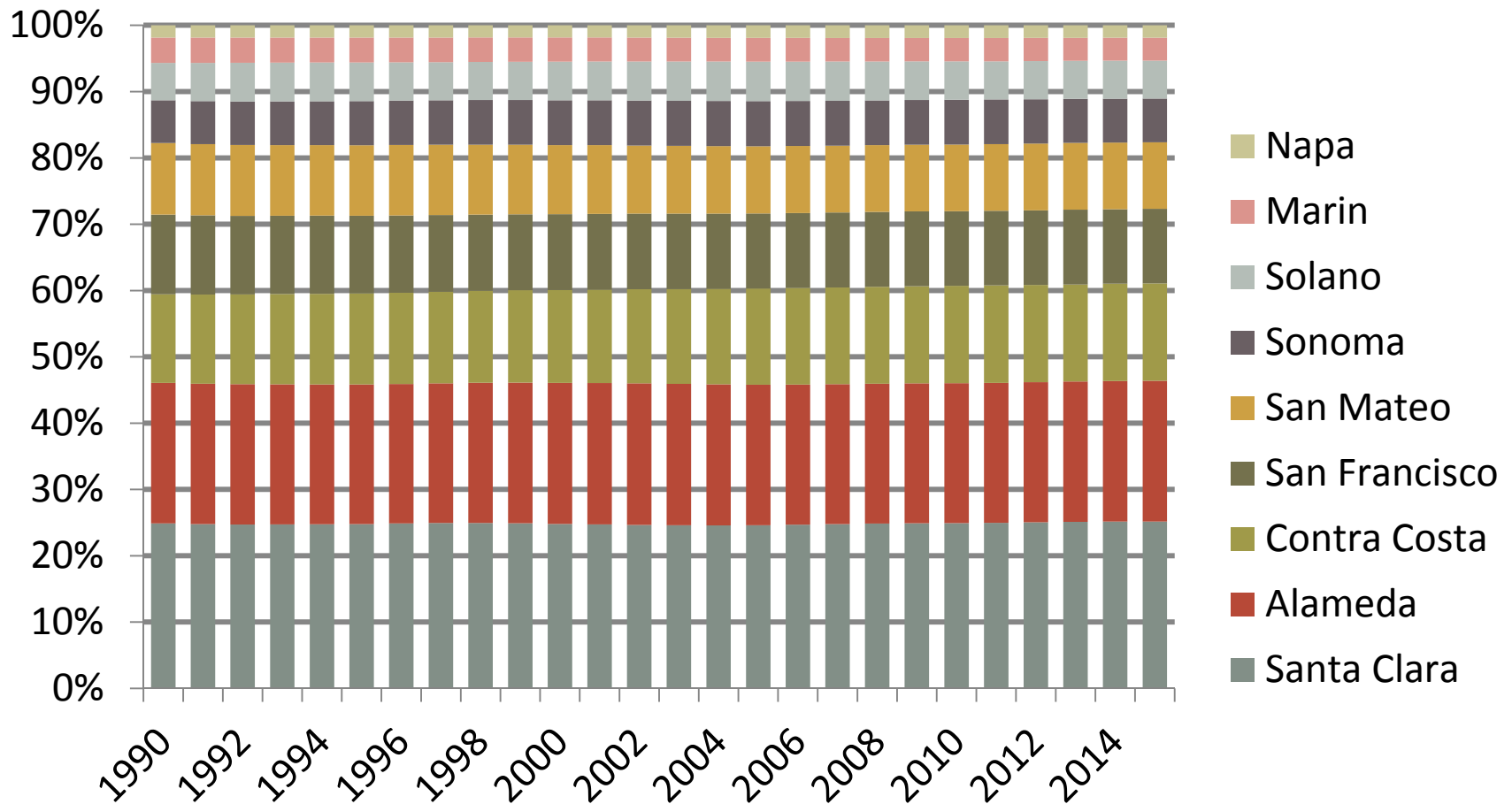


Bay Area Population Trends 1990-2015



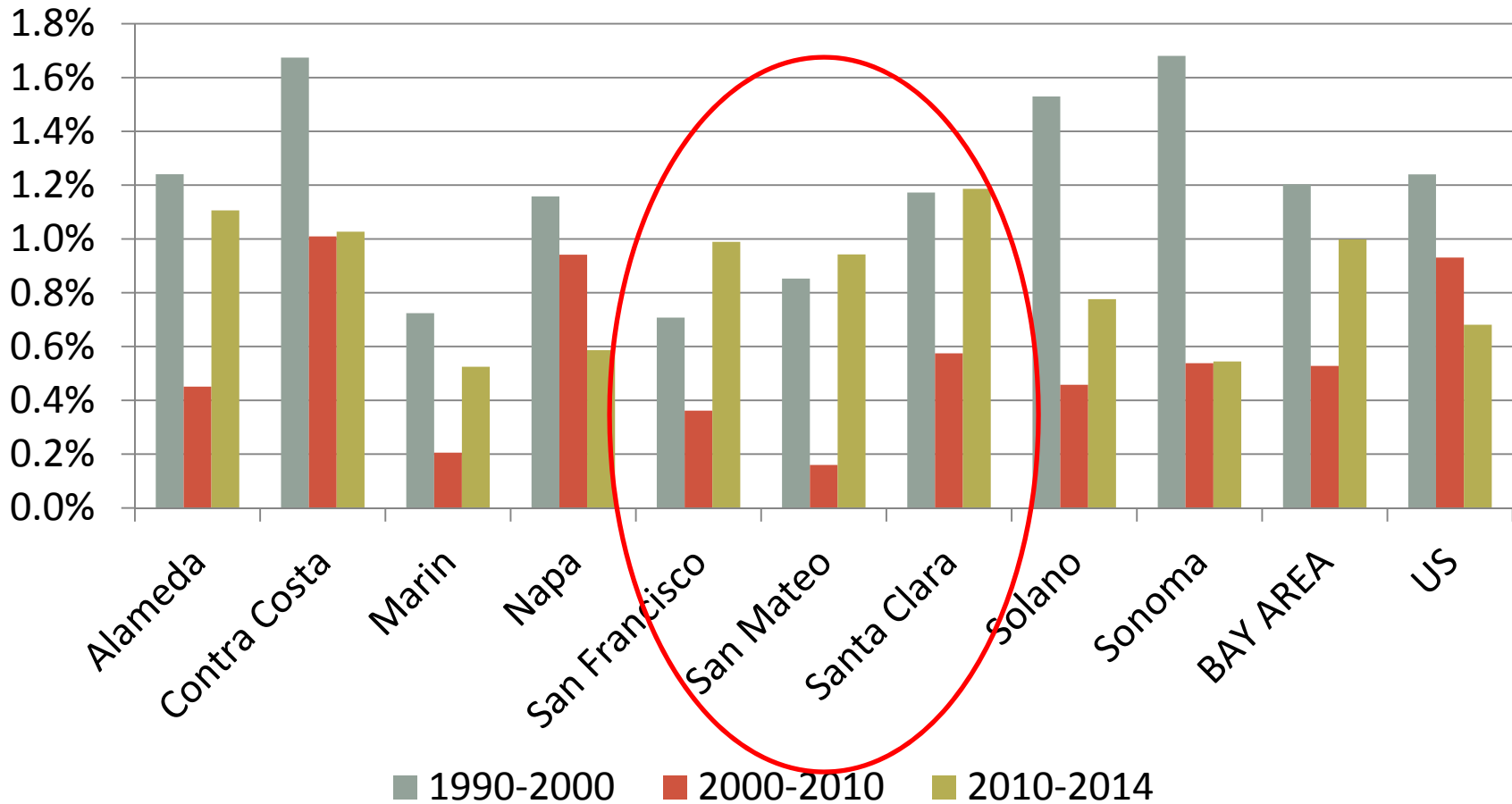
Source: ABAG from California Department of Finance E-5 Series to January 2015.

Across the Bay Area Population Shares Change Gradually



Source: ABAG from California Department of Finance E-5 Series to January 2015.

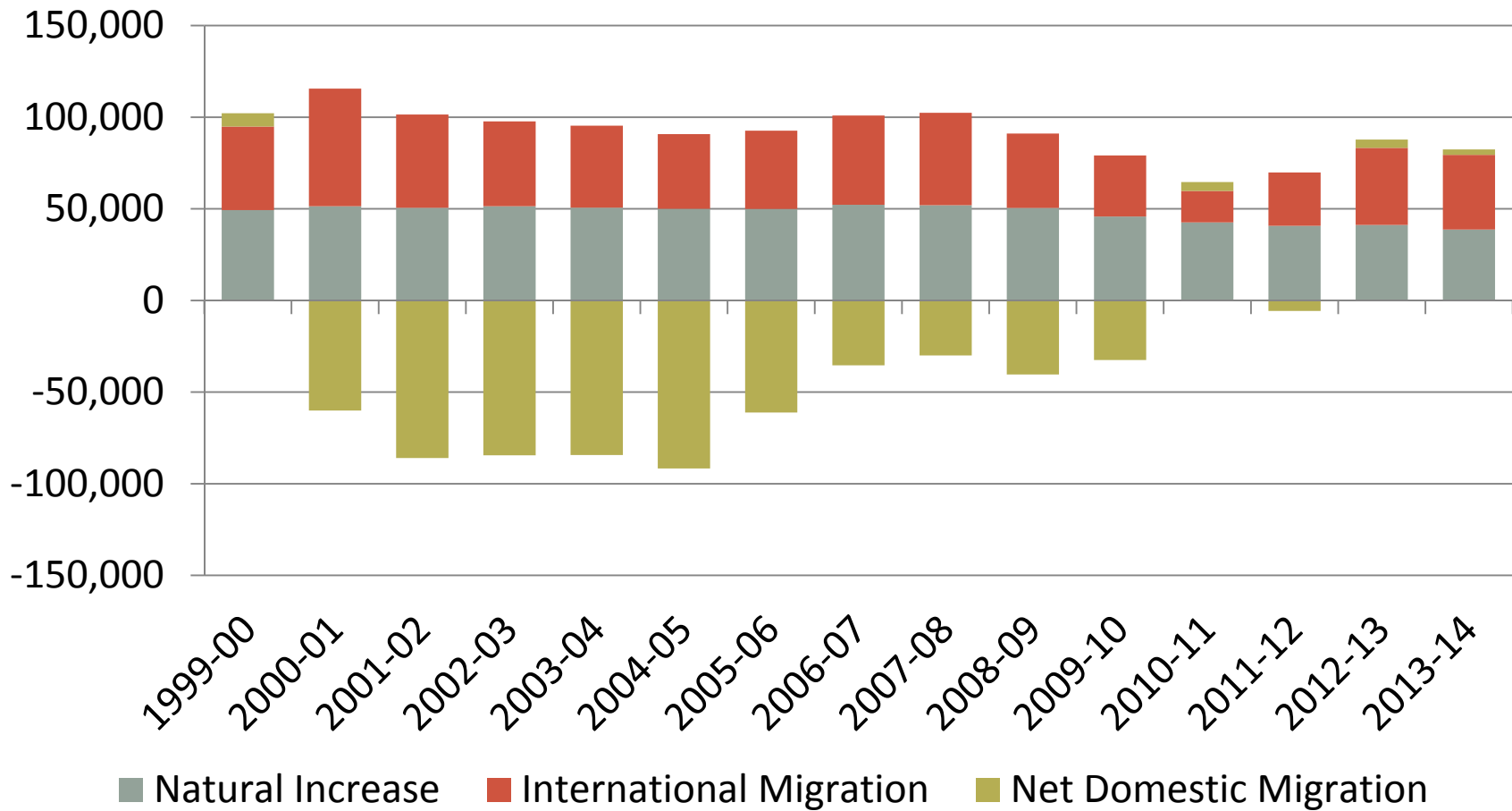
Population—Annual Rate of Change by County, Decade



Source: ABAG from California Department of Finance Table E-5 series to January 2014.

Bay Area Components of Change

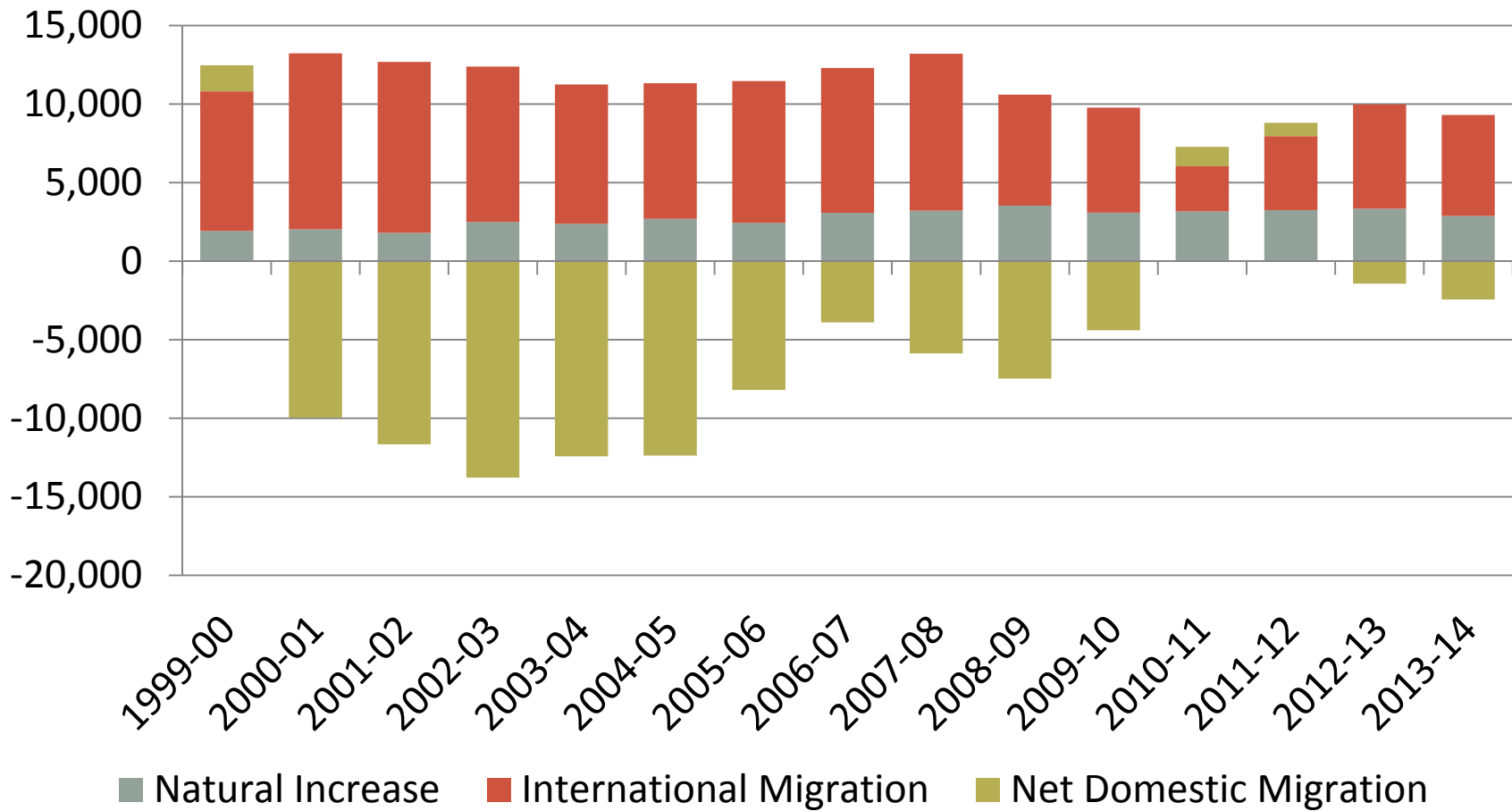
California DOF Estimates



Source: ABAG from California Department of Finance Table E-2 series.

San Francisco Components of Change

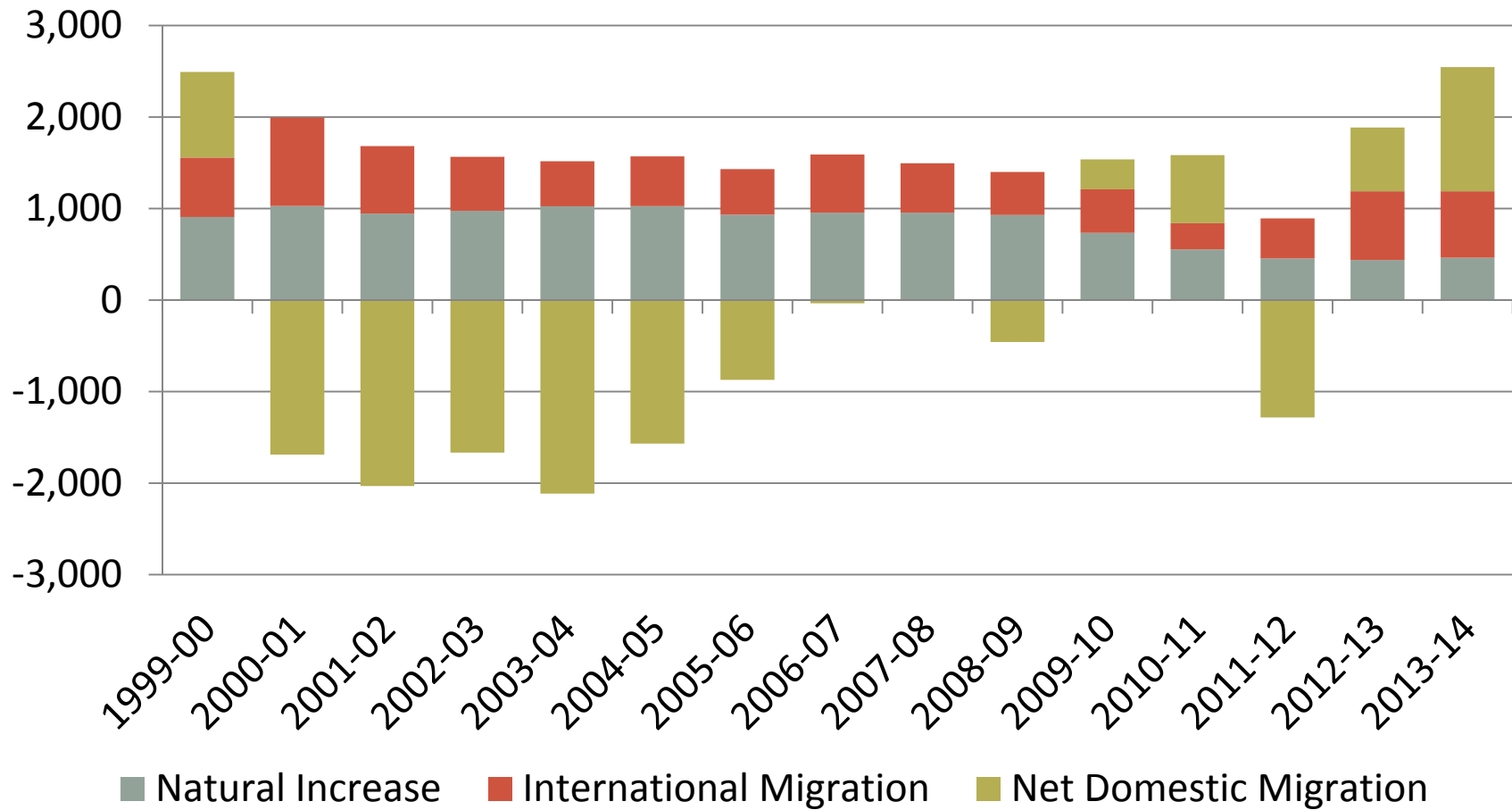
California DOF Estimates



Source: ABAG from California Department of Finance Table E-2 series.

Marin County Components of Change

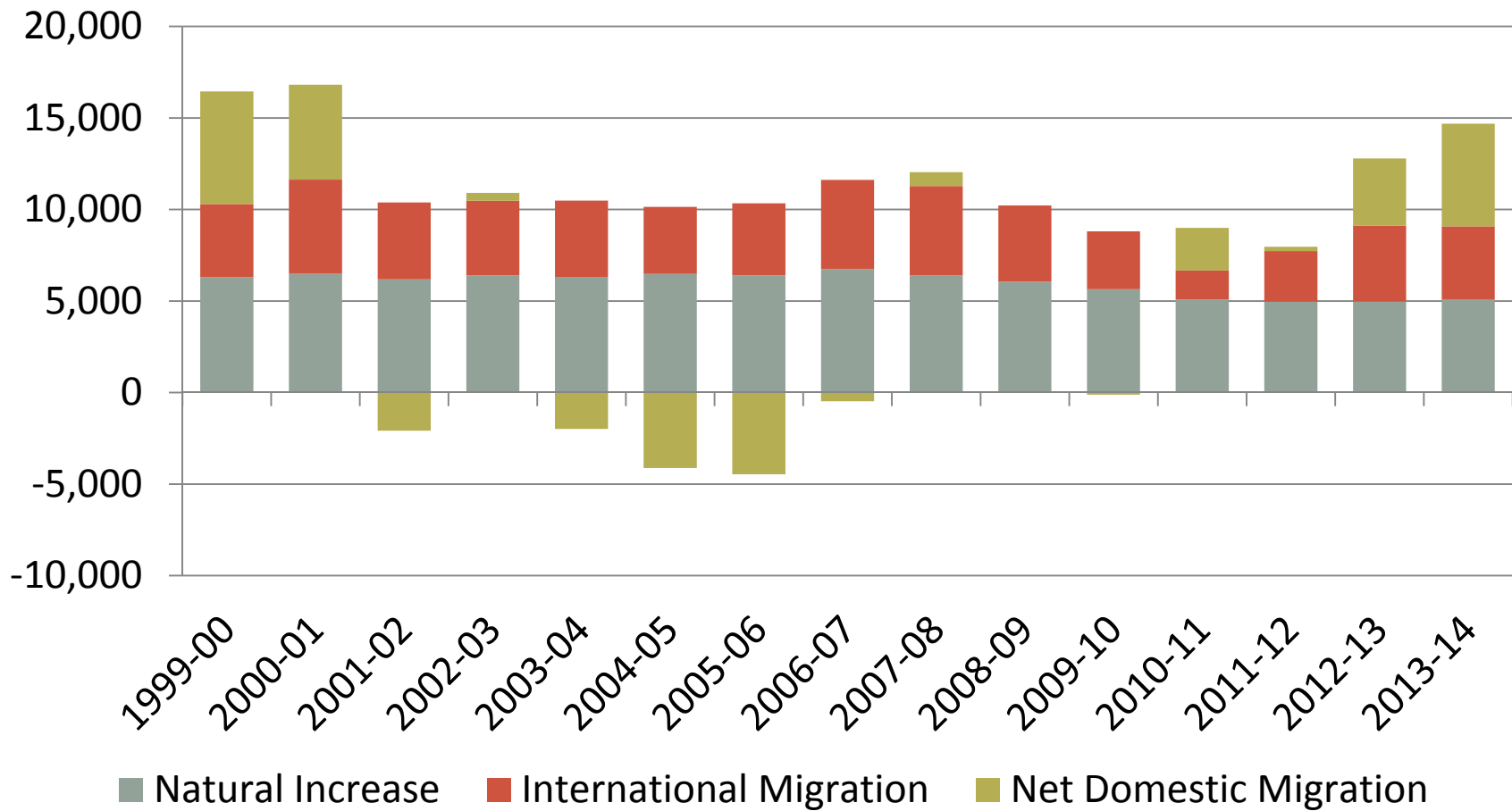
California DOF Estimates



Source: ABAG from California Department of Finance Table E-2 series.

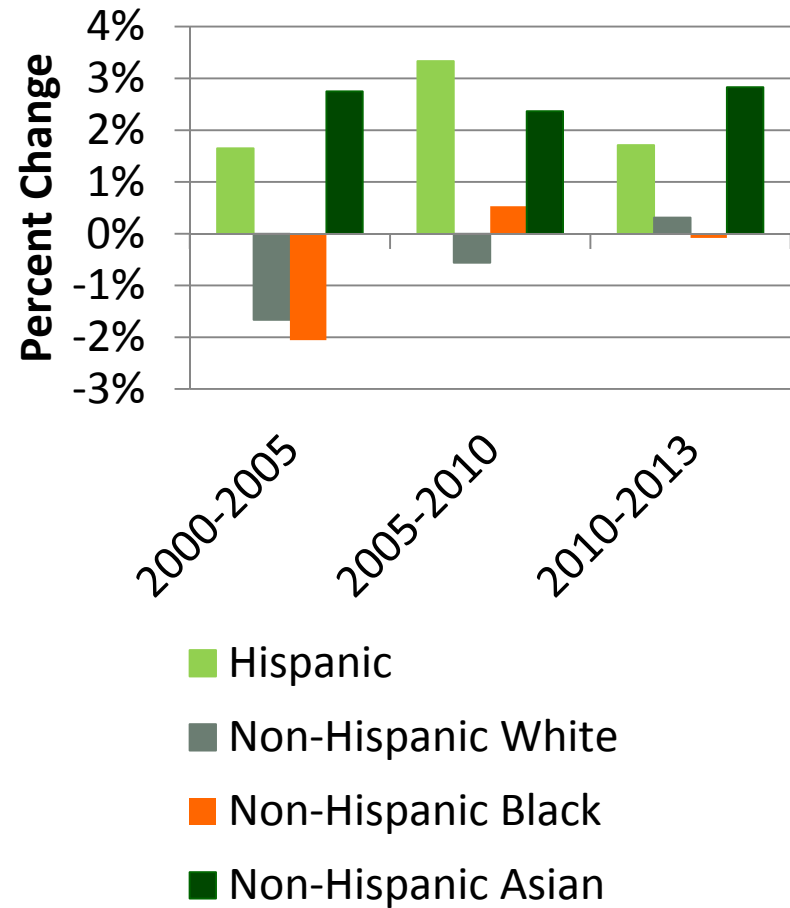
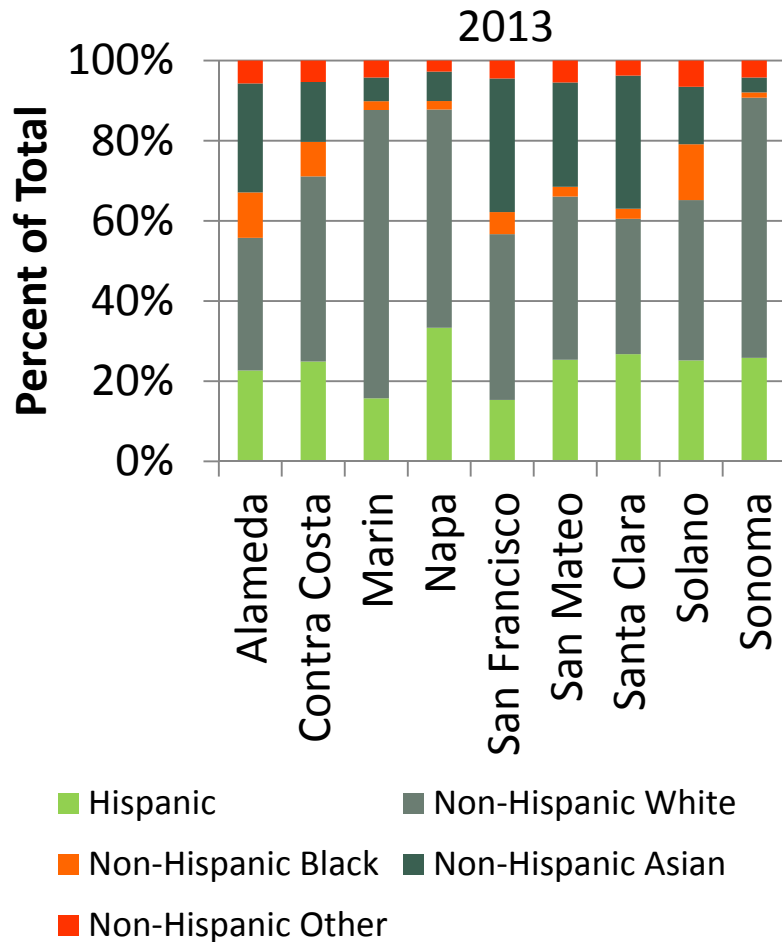
Contra Costa Components of Change

California DOF Estimates



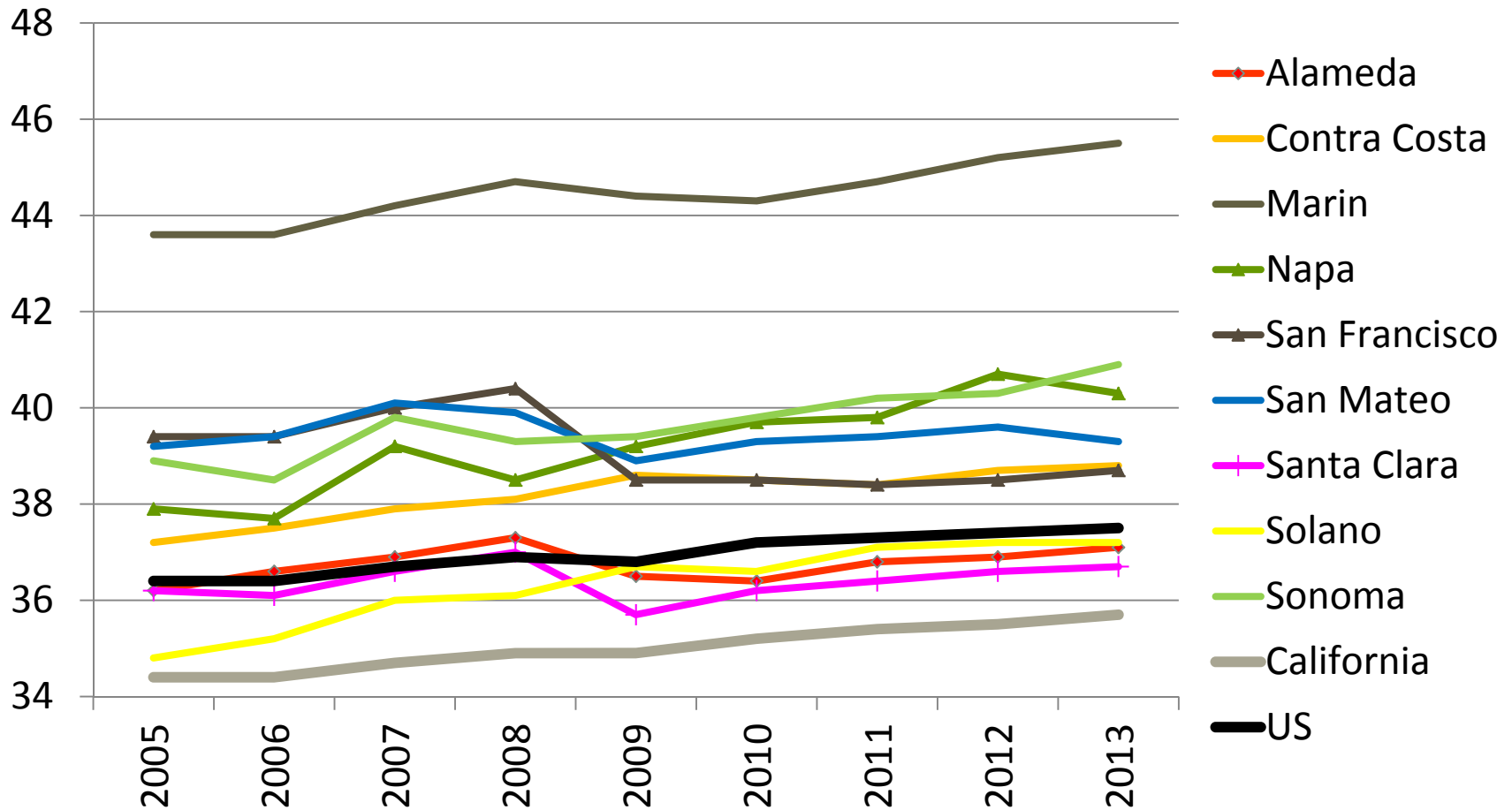
Source: ABAG from California Department of Finance Table E-2 series.

Diversity is Happening Faster in Some Counties than Others



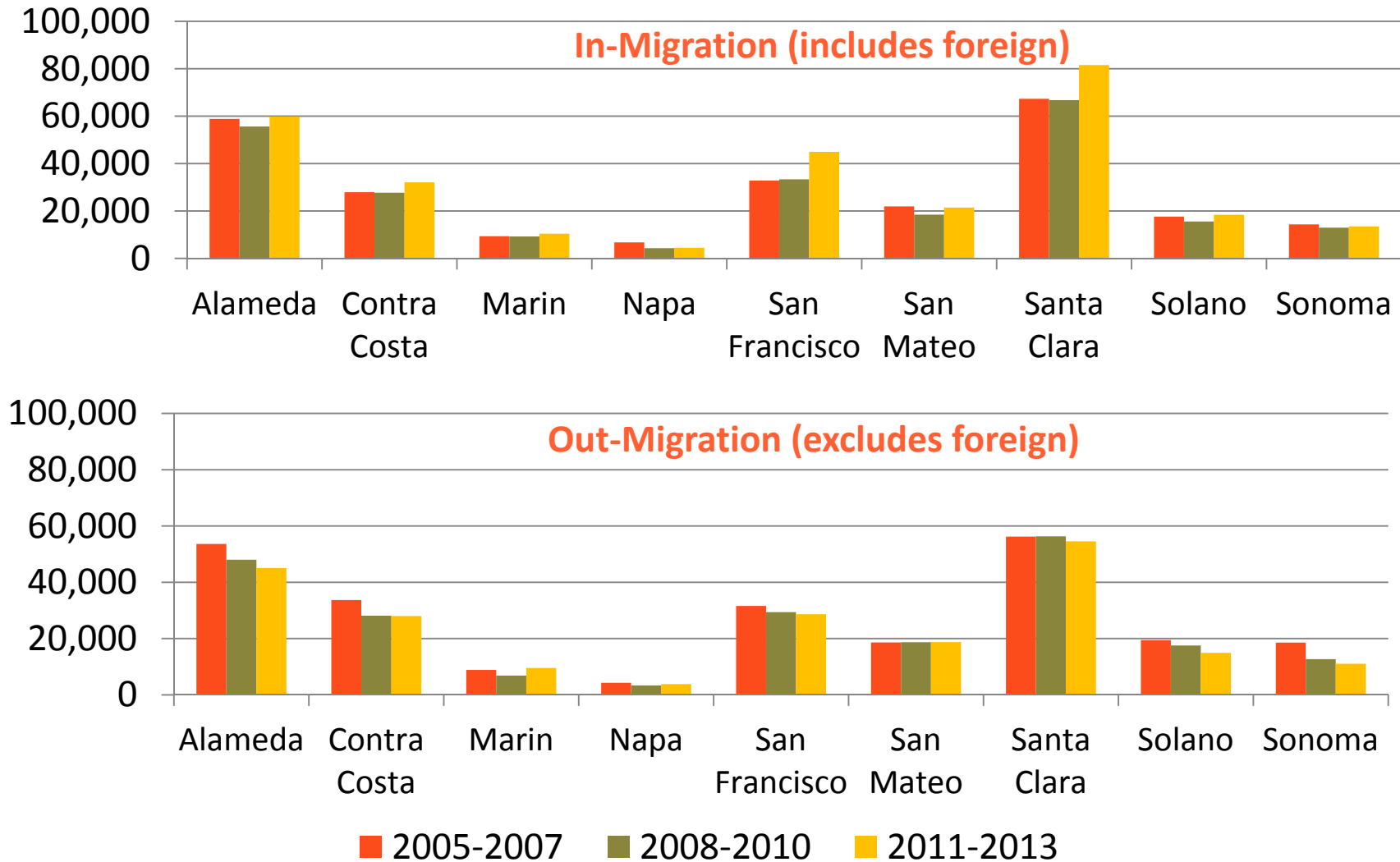
Source: ABAG from US Census ACS data

Getting Older—or Younger



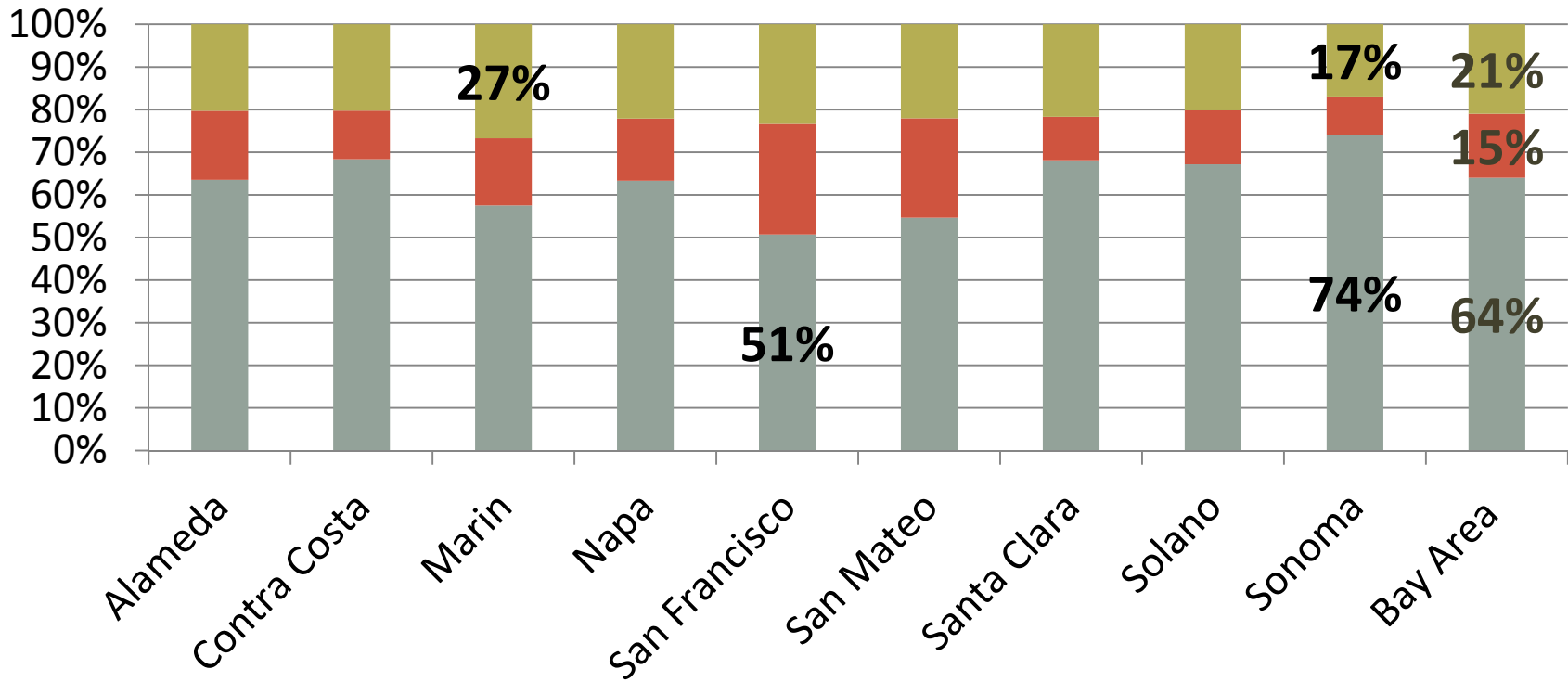
Source: ABAG from US Census ACS data

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

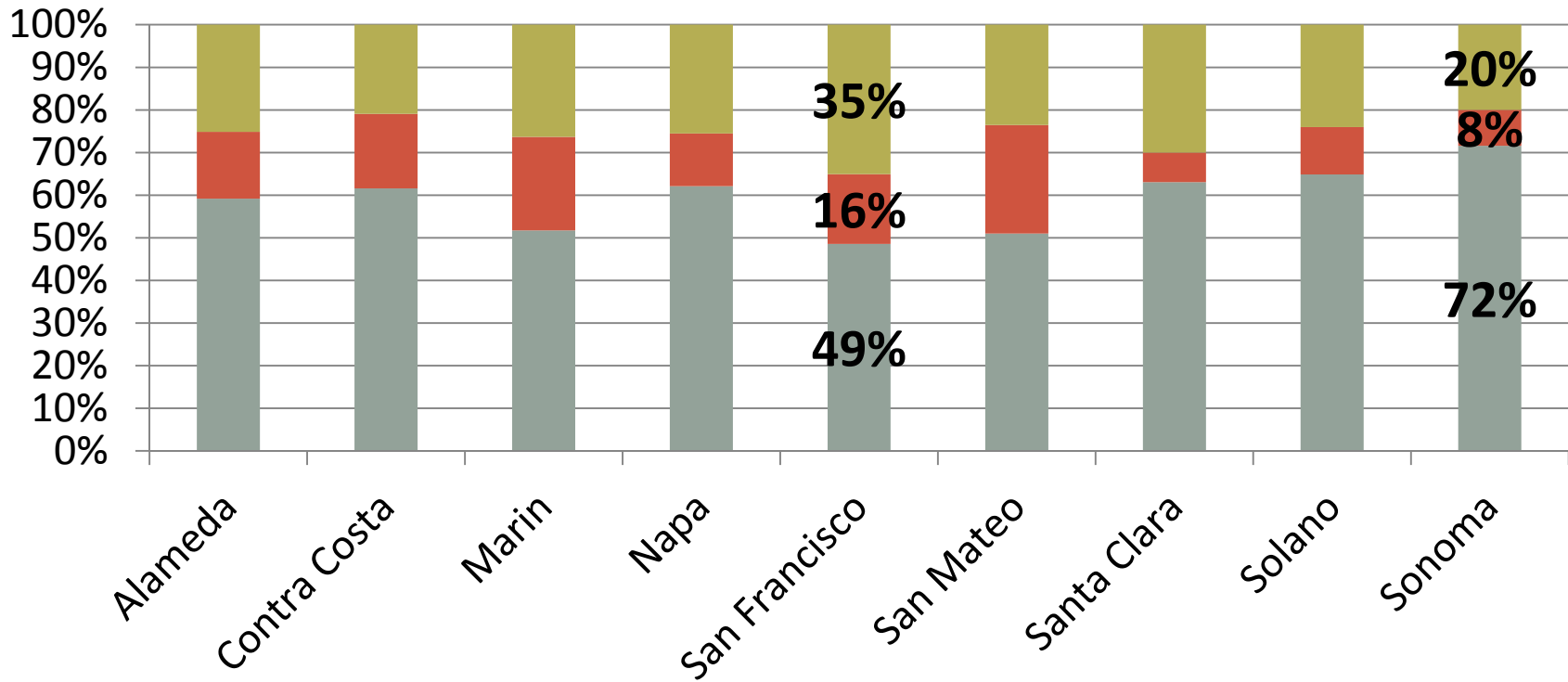


People Who Moved From a Home in These Counties Went to...

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

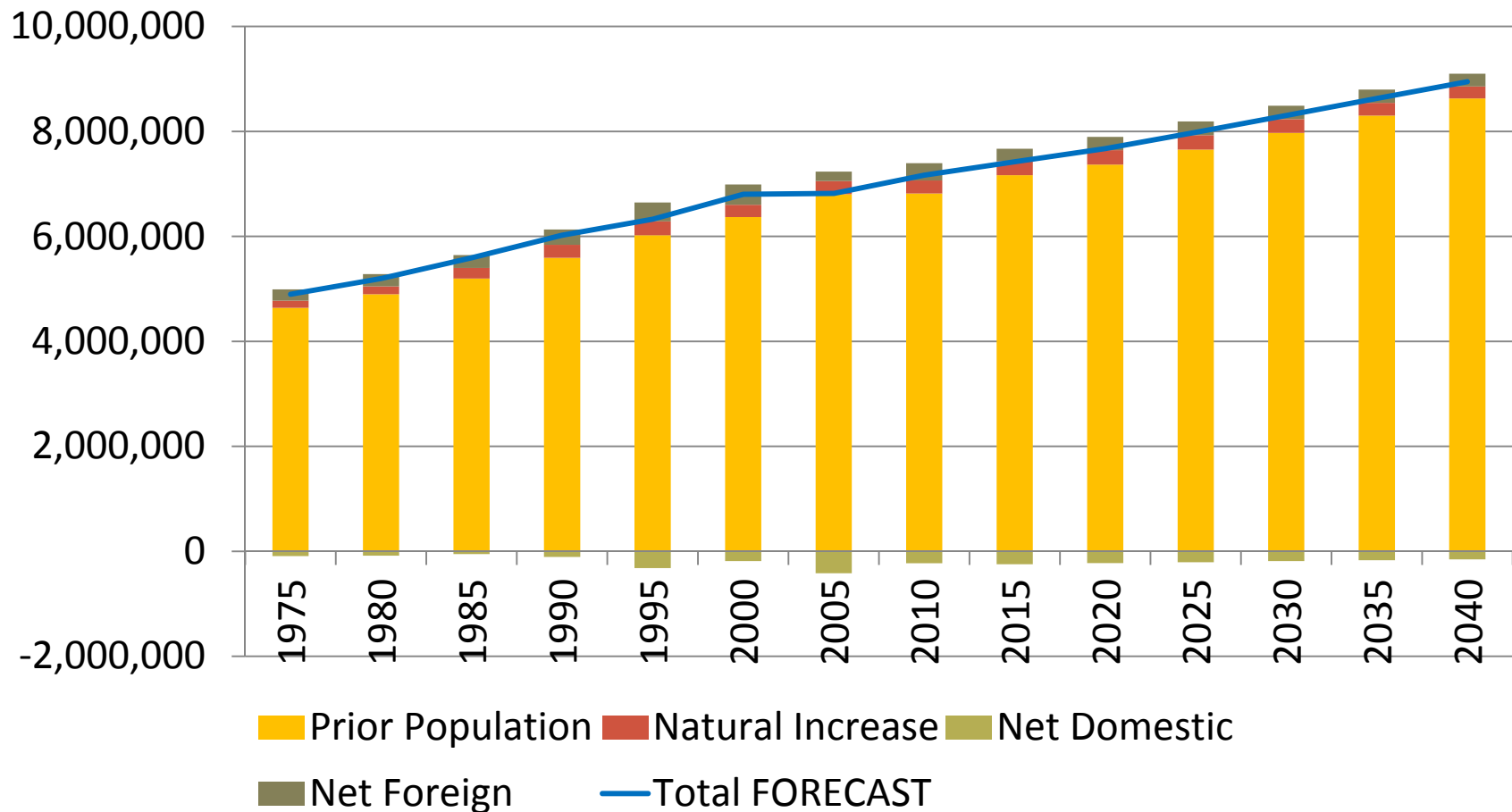


People Who Moved into a Home in these Counties Came FROM...

Same County
 Rest of Region
 From Outside

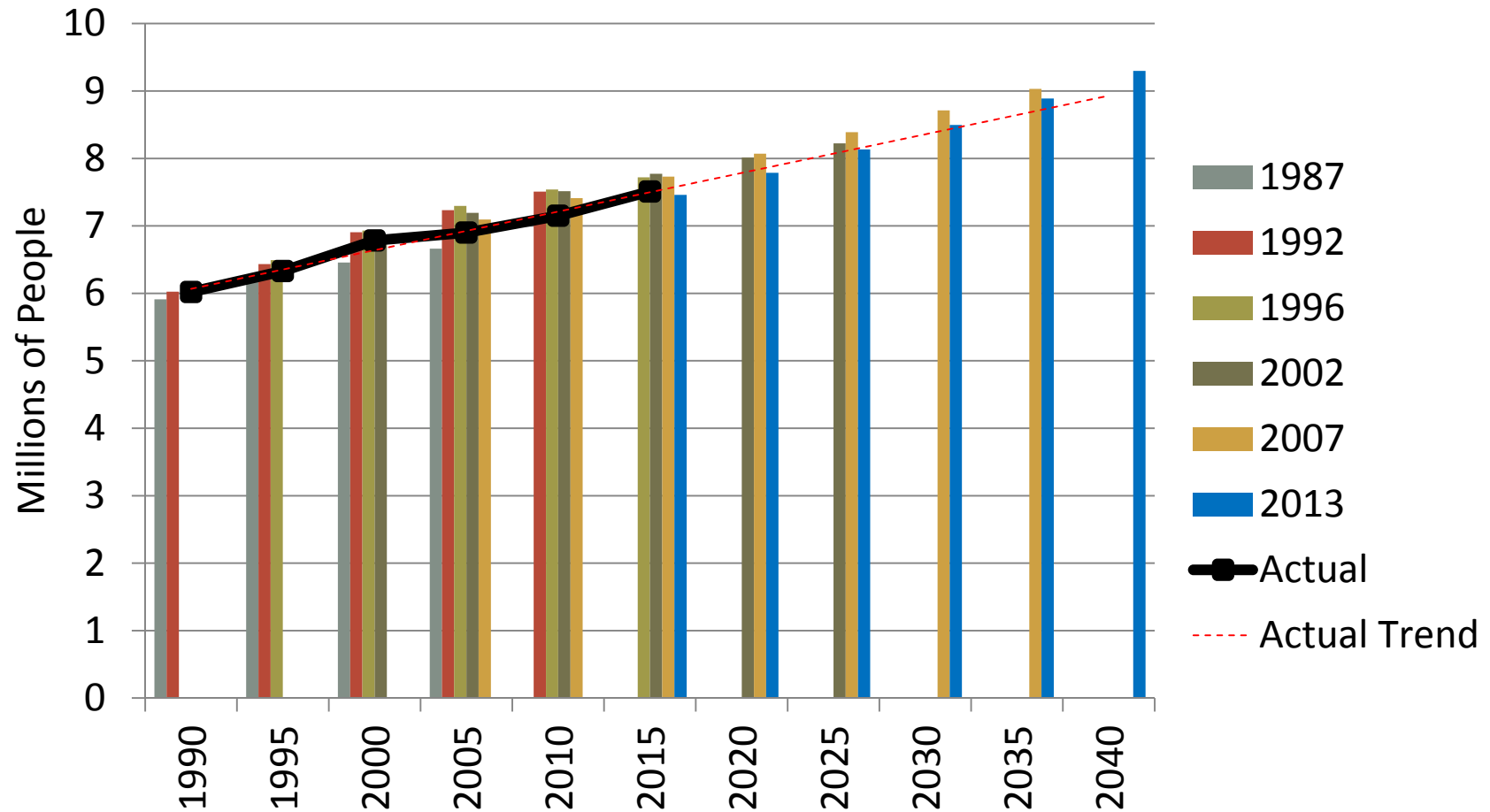
Source: ABAG from US Census ACS data

The Marginal Change in Population in the Bay Area Tends to be Small—1% or Less



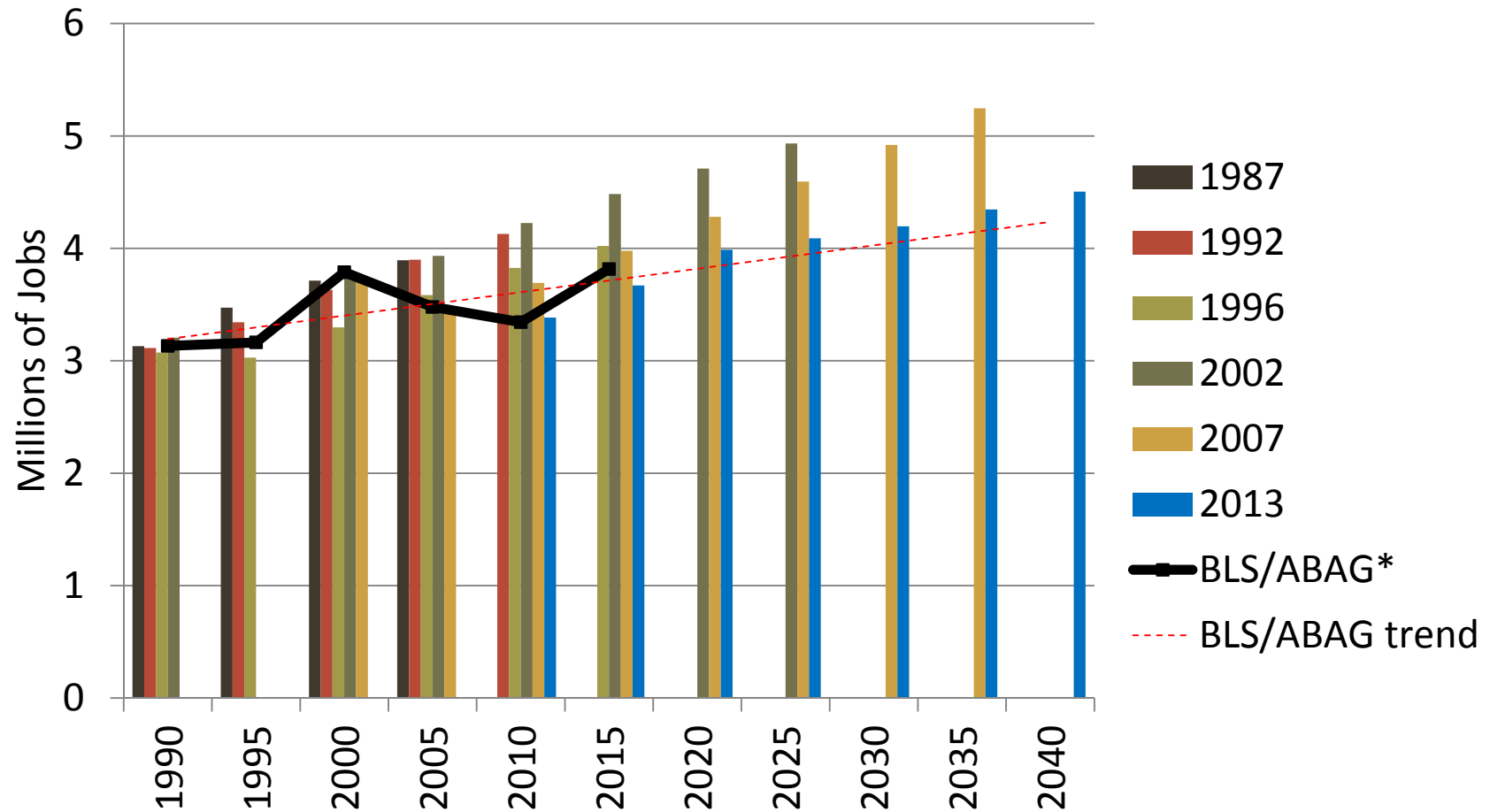
Source: ABAG from Pitkin-Myers analysis and preliminary forecast.

Bay Area Population Forecasts Have Come Close



Source: ABAG from *Projections* series and California Department of Finance.

Bay Area Employment Forecasts are Harder

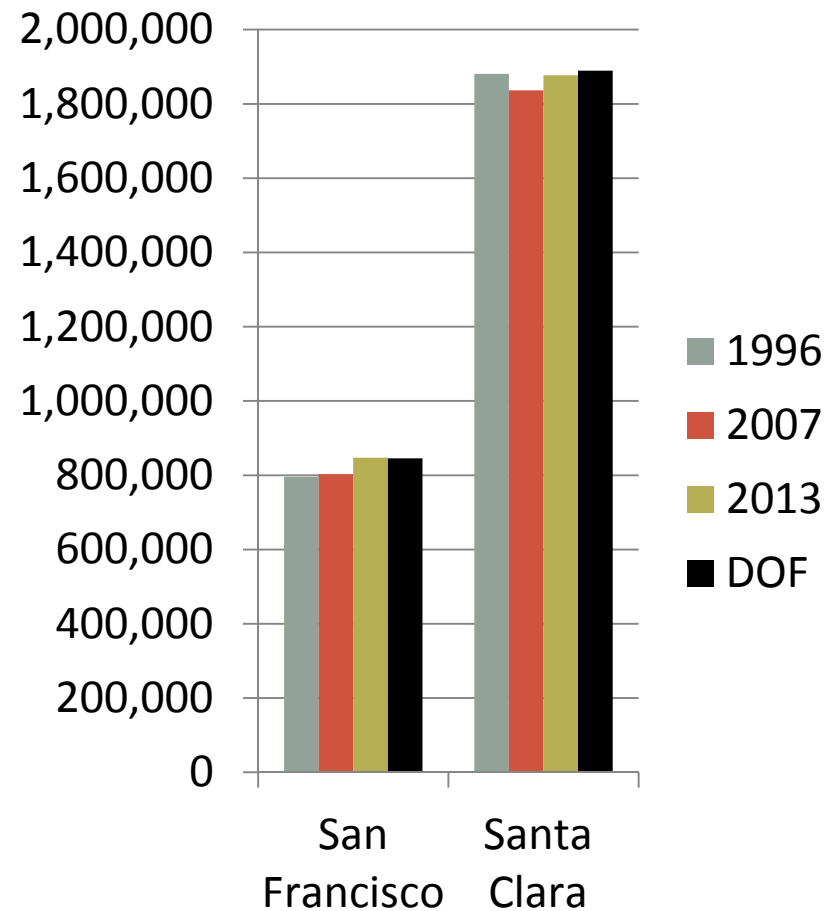
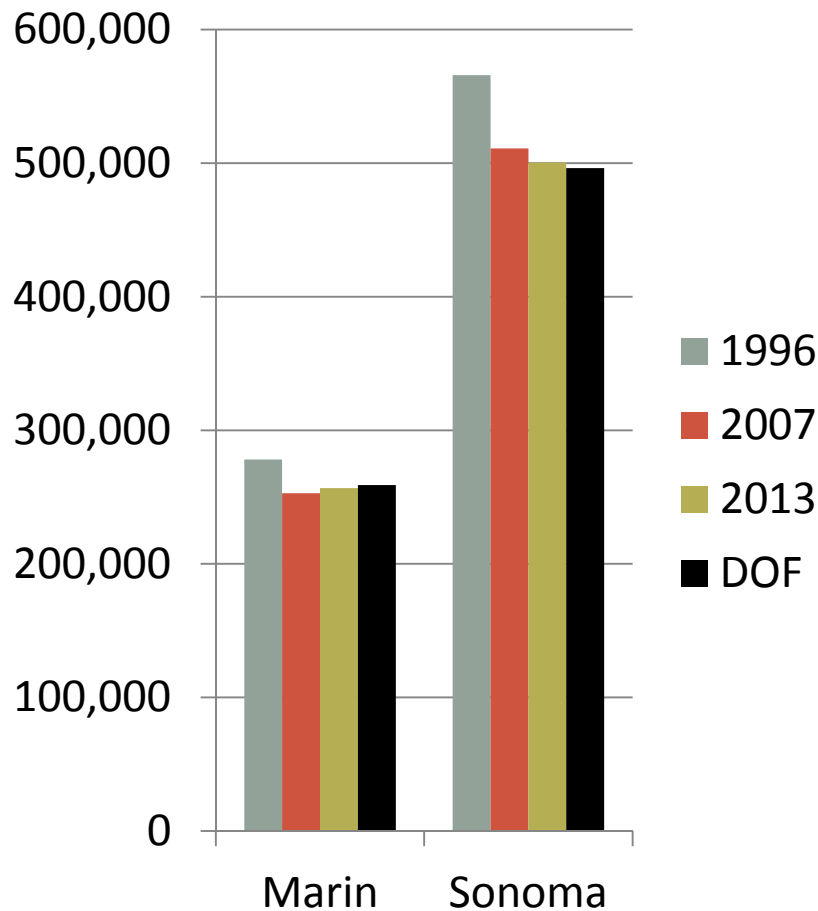


Source: ABAG from *Projections* series and BLS data.

* 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



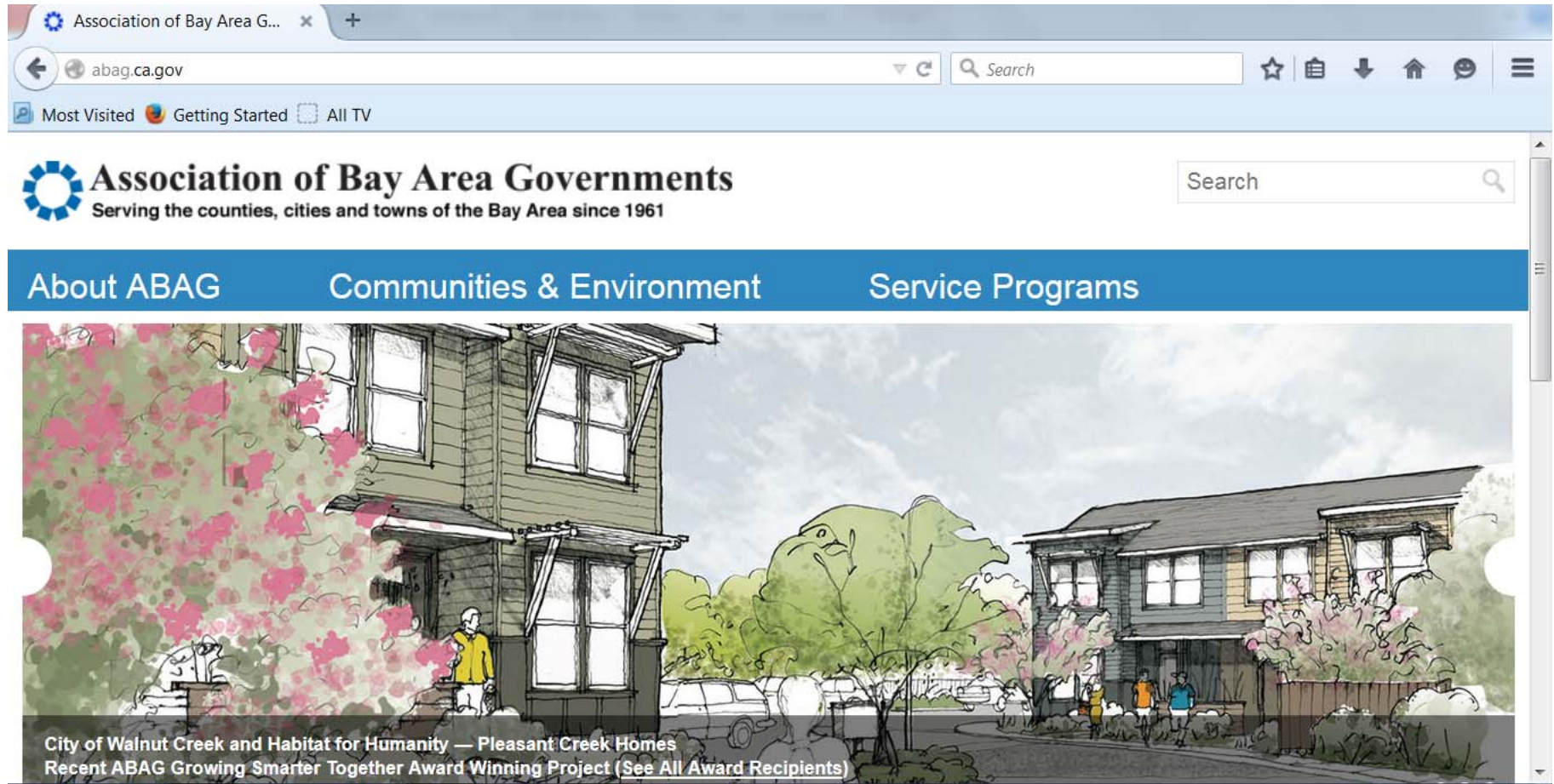
Source: ABAG from *Projections* series and California Department of Finance.

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!

<http://abag.ca.gov>



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