



A Regional Growth Forecast

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2022 Regional Growth Forecast

Technical Documentation

Association of Monterey Bay Area Governments
Scheduled for Adoption June 2022

2022 Regional Growth Forecast

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Executive Summary

As the Metropolitan Planning Organization (MPO), the Association of Monterey Bay Area of Governments (AMBAG) carries out many planning functions for the tri-county area including development and maintenance of the regional travel demand model (RTDM), long range transportation planning and programming and acting as a regional forum for dialogue on issues facing the region. Most of AMBAG's projects are carried out in support of these major functions, including but not limited to the regional growth forecast. AMBAG develops the forecast with a horizon year that matches the planning timeline of the Metropolitan Transportation Plan (MTP) and the model years for the Regional Travel Demand Model (RTDM). In addition to informing regional planning processes, the forecast is used by local jurisdictions and special districts to inform local and subregional planning.

The last regional growth forecast was adopted in 2018. AMBAG staff began the process of developing a new forecast in spring 2019. This new forecast is referred to as the 2022 Regional Growth Forecast (2022 RGF).

In preparation for this forecast, AMBAG staff conducted a review of recently completed population, housing and employment forecasts. The results of this review indicated that most of the other MPOs in California are using a methodology that emphasizes employment growth as the primary driver of long-term population change at the regional scale. The traditional approach to forecasting population uses a cohort-component approach that considers three factors: births, deaths and migration. While birth and death data are readily available and trends are relatively predictable over time, migration tends to be much more difficult to track and forecast as it is heavily influenced by political and economic climates. For the development of the new forecast, AMBAG chose to progress towards a more contemporary approach that places a greater emphasis on employment. The assumption is that the economy is a reliable predictor of population growth.

AMBAG implemented an employment-driven forecast model for the first time in the 2014 forecast and contracted with the Population Reference Bureau (PRB) to test and apply the model again for the 2018 RGF and the 2022 RGF. To ensure the reliability of the population projections, PRB compared the employment-driven model results with results from a cohort-component forecast, a growth trend forecast, and the most recent forecast published by the California Department of Finance (DOF). All four models resulted in similar population growth trends. As a result of these reliability tests, AMBAG and PRB chose to implement the employment-driven model again for the 2022 RGF.

To disaggregate the forecast for each jurisdiction, AMBAG and PRB used the most current data available to update a series of shift-share models and replicate the methodology used in the prior forecast.

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This technical document provides a description of the methodology for the development of the regional growth forecast figures in addition to the methodology for disaggregation of those figures. The regional and subregional forecast figures for population, jobs and housing were accepted by the AMBAG Board of Directors at the November 18, 2020 meeting.

Summary of the Forecast

The 2022 RGF projects that the region will add 65,500 jobs between 2015 and 2045, for a total of just over 442,800 jobs by 2045. The regional growth rate is slightly slower than nation- and state-level forecasts, reflecting historical growth rates that have tended to be slightly slower than either the state or nation. Furthermore, job growth is expected across most employment sectors. The fastest-growing industries include Site-Based Skilled Trade, Health Care and Social Assistance, and Other Services. Conversely, Retail is expected to be the slowest-growing industry. Notably, while many models for the U.S. predict declines in agricultural job growth, the AMBAG region is experiencing steady agricultural job growth.

This forecast projects that the region's population will grow by approximately 107,500 people between 2015 and 2045, for a total population of just under 869,800 in 2045. This is slightly lower than prior forecasts and follows the slowing growth rates seen at both the state and national level. This revised growth trend also reflects the most current population estimate for the region. As a result of declining fertility, stalled improvements in life expectancy, and falling international migration, the 2020 population estimate was more than 16,000 lower than prior forecasts predicted. In addition to slower growth, the new forecast predicts an older age distribution, with a larger proportion of the population age 65 and older.

An aging population affects the household and housing unit forecasts. While population growth will slow, which reduces future housing demand, older people are more likely to live alone or in small households. This shift offsets the lower population forecast with a slight upward effect on housing demand. The net result is that the region is expected to build just over 42,200 housing units by 2045, for a total of approximately 304,900 units.

Section 1: Process for Forecast Completion

Following the preparation of the regional forecast figures, AMBAG staff began the process of disaggregating the figures to each of the jurisdictions using historical data to develop a baseline disaggregated forecast. The initial results were a purely quantitative application of the methodology. These preliminary draft disaggregated numbers were presented for discussion purposes at one-on-one meetings held by AMBAG staff with each of the jurisdictions, the Local Agency Formation Commissions,

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the Fort Ord Reuse Authority, the University of California, Santa Cruz and the California State University, Monterey Bay. AMBAG staff also provided materials for these meetings that outlining the data sources and methodology for the regional forecast figures as well as the preliminary draft disaggregated forecast figures. The intent of the first round of meetings was to gather information and data that was then used to make adjustments to the forecast. (See Attachment 1 for a list of meeting dates, times and attendees.)

These preliminary draft disaggregated numbers were adjusted based on information and feedback provided by each jurisdiction. In addition, new data became available. The release of vintage 2020 estimates from the California Department of Finance showed 2019 population approximately 7,000 lower than in the preliminary estimate, although housing estimates were relatively stable. These updates necessitated minor revisions to the regional forecast.

Staff updated the regional growth forecast to reflect the most current information. The entire revised forecast, regional and subregional, was re-circulated for a second round of comments. After the second round of comments were received, AMBAG staff incorporated additional input and prepared a revised draft of the disaggregated forecast figures. Staff circulated the revised population, employment and housing forecast which incorporated additional comments from the Board of Directors. The final draft was accepted for planning purposes only by the AMBAG Board of Directors at its meeting on November 18, 2020. The final growth forecast is scheduled for adoption along with the 2045 Metropolitan Transportation Plan/Sustainable Communities in June 2022.

Section 2: Development of the Regional Growth Forecast

In spring 2019, AMBAG asked PRB to prepare regional employment, population and housing projections to 2045. This section documents the findings of the work by PRB and includes a summary of the methodology, a description of the projections and an explanation of past, current and projected job growth in the region.

Summary of the 2022 Regional Growth Forecast

The 2022 RGF projects that the region will add 65,500 jobs between 2015 and 2045, for a total of just over 442,800 jobs by 2045. (See Table 1) The regional growth rate is similar to national forecasts but slightly slower than state-level forecasts. Furthermore, job growth is expected across most employment sectors. The fastest-growing industries include Site-Based Skilled Trade, Health Care and Social Assistance, and Other Services. Conversely, Retail is expected to be the slowest-growing industry. Notably, while many models for the U.S. predict declines in agricultural job growth, the AMBAG region is experiencing steady agricultural job growth.

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This forecast projects that the region's population will grow by approximately 107,500 people between 2015 and 2045, for a total population of just under 869,800 in 2045. (See Table 1) This is slightly lower than prior forecasts and follows the slowing growth rates seen at both the state and national level. This revised growth trend also reflects the most current population estimate for the region. Despite an upward revision to the estimate, the revised DOF population estimate for 2015 was more than 3,000 lower than prior forecasts predicted. As such, an adjustment was made in this forecast of population growth to account for the sharp fall in fertility rates and international migration that occurred during the recession years that have not fully rebounded. In addition to slower growth, the new forecast predicts an older age distribution, with a larger proportion of the population age 65 and older.

An aging population affects the household and housing unit forecasts. While population growth will slow, which reduces future housing demand, older people are more likely to live alone or in small households. This shift offsets the lower population forecast with a slight upward effect on housing demand. The net result is that the region is expected to build just over 42,200 housing units by 2045, for a total of approximately 304,900 units. (See Table 1)

Table 1: Forecast Summary

| | 2000 | 2005 | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 |
|-------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Population | 710,598 | 719,561 | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 |
| Change | | 8,963 | 13,147 | 29,533 | 12,488 | 25,997 | 24,266 | 17,197 | 15,639 | 11,948 |
| % Change | | 1% | 2% | 4% | 2% | 3% | 3% | 2% | 2% | 1% |
| Households | 228,260 | 234,869 | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 |
| Change | | 6,609 | 1,190 | 2,803 | 5,001 | 9,243 | 9,387 | 6,682 | 4,287 | 3,268 |
| % Change | | 3% | 1% | 1% | 2% | 4% | 4% | 3% | 2% | 1% |
| Housing | 247,080 | 256,467 | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 |
| Change | | 9,387 | 3,789 | 2,404 | 5,152 | 9,833 | 10,741 | 7,966 | 4,955 | 3,593 |
| % Change | | 4% | 1% | 1% | 2% | 4% | 4% | 3% | 2% | 1% |
| Jobs | | | | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 |
| Change | | | | 25,600 | 28,945 | 3,737 | 8,115 | 7,713 | 8,302 | 8,677 |
| % Change | | | | | 8% | 1% | 2% | 2% | 2% | 2% |

Sources: Jobs data for 2000-2015 are from California Employment Development Department and InfoUSA; population, household, and housing data for years 2000-2020 are from the U.S. Census Bureau and the California Department of Finance. Forecast years were prepared by AMBAG and PRB.

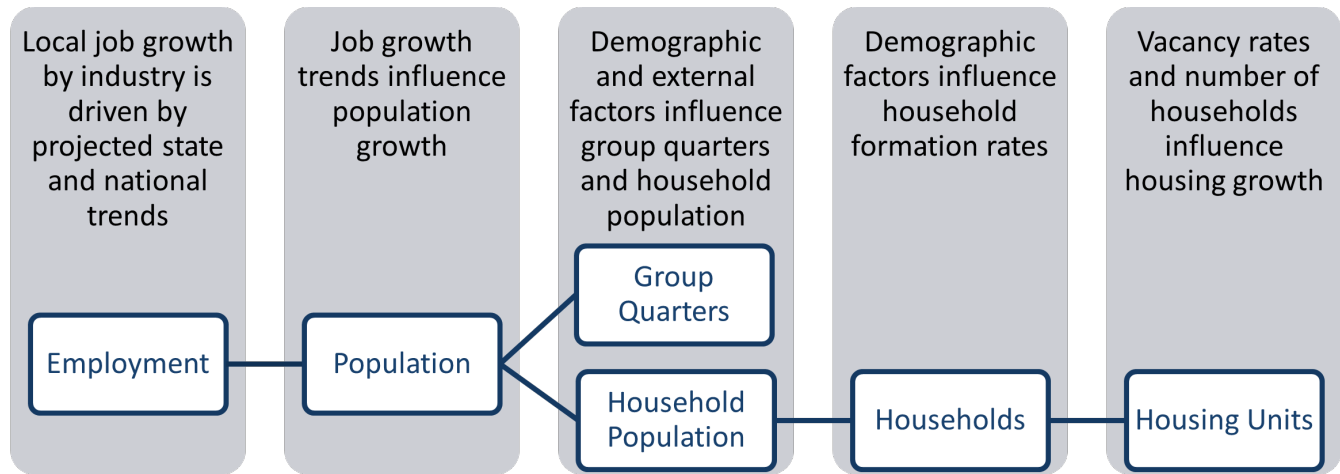
Regional Growth Forecast Methodology

As shown in the flow chart below, the forecast uses a model that predicts employment growth using a shift-share model based on local data as well as state and national trends. Population growth is then driven by employment growth. Household and housing growth are driven by population growth, demographic factors and external factors (explained below). This approach was vetted and approved by the AMBAG Board of Directors in 2014 for use in the metropolitan transportation plan, Moving Forward 2035 Monterey Bay. While the methodology for the 2022 RGF remains the same, the models

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have been updated to include current data, a revised base year of 2015 and a new horizon year of 2040.

Figure 1: Regional Growth Forecast Process



1. **Employment:** Employment is measured as the number of jobs by place of work. Employment growth by industry is driven by projected national and statewide trends for all industries in the region using a shift-share model.
2. **Population:** Population is the total resident population of the region. Job growth trends influence population growth. The forecast of total population is based on historical trends in the ratio of population to employment in the AMBAG region. Projections of demographic characteristics (i.e., population by age, sex, and race/ethnicity) in the 2022 RGF relied on a proportional approach based on demographic projections from the California Department of Finance (DOF).
3. **Household Population and Group Quarters:** Household population is the population that lives in a housing unit. Group quarters population is the population that lives in a group living arrangement such as a dorm, barracks, correctional institution, or congregate care facility. Demographic factors (e.g., age, sex, race/ethnicity) and external factors (e.g., major group quarters facilities like colleges and universities, correctional facilities, etc.) influence the household population and group quarters population.
4. **Households/Occupied Housing Units:** A household is a person, or group of people, living in a house. Because a household, by definition, occupies a housing unit, households are equivalent to and synonymous with occupied housing units. Household projections are driven by household formation rates. Household formation rates are calculated as the ratio of households divided by the household population. Household formation rates are the inverse of average household size.
5. **Housing Units:** Housing is the total number of housing units, including both occupied and vacant structures. Housing includes primary residences, second homes, accessory dwelling

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units, vacation rentals, farmworker housing, and any other habitable structure—including unauthorized units. The only type of dwelling excluded from the housing inventory is group quarters (dorms, barracks, congregate care, etc.).

Housing projections are driven by the household population projection, demographic characteristics of the household population (age, sex, race/ethnicity), household formation rates, and housing vacancy rates. Vacancy rates are calculated as the share of all units (including vacation rentals, unauthorized dwellings, etc.) that are not currently occupied.

Data sources include the California Department of Finance, California Employment Development Department, the U.S. Bureau of Labor Statistics and the U.S. Census Bureau.

For more information on the definitions of housing and group quarters, see Attachment 4.

Step 1: Employment

The AMBAG region is projected to add 65,500 jobs between 2015 and 2045, for a total of just over 442,800 jobs by 2045. The 2015 base year data were re-benchmarked to reflect revisions to county totals published by the California Employment Development Department, as well as an employer database from InfoUSA, and extensive ground-truthing conducted by AMBAG staff. (See Table 2 and Figure 2.) Employment grew faster in the 2015-2020 time period than had been anticipated in the 2018 RGF, but is expected to return to a slow-growth trend.

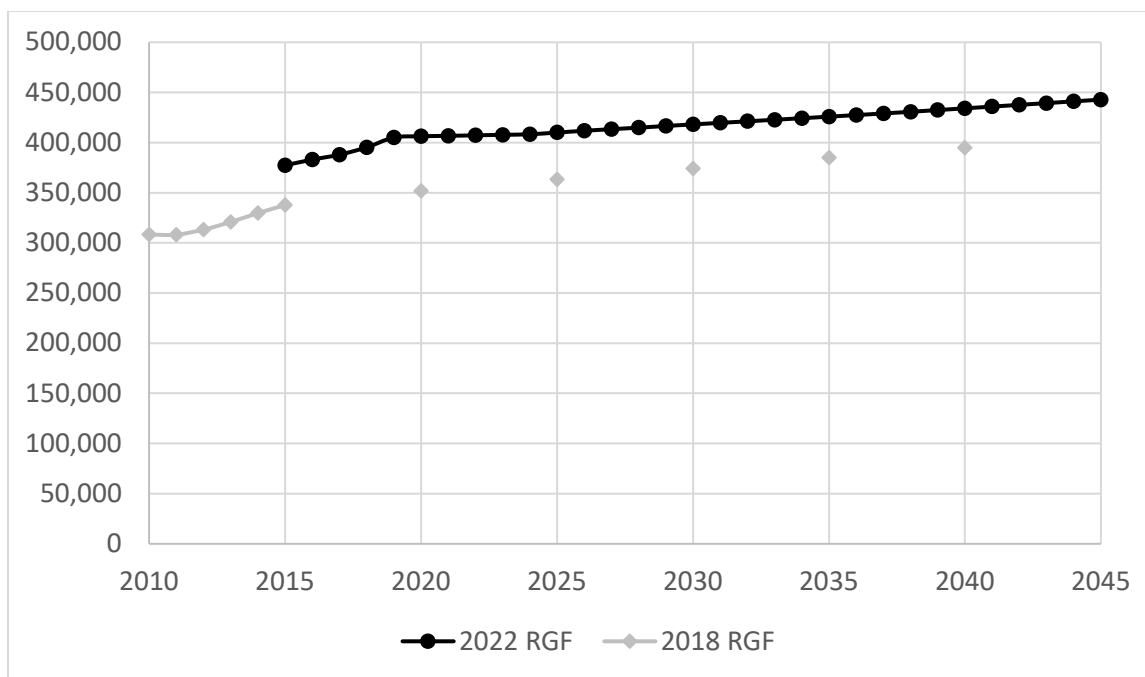
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Table 2: Forecast Comparison of Employment

| Forecast | 2010 | 2015* | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 |
|-----------------|---------|---------|---------|---------|---------|---------|---------|---------|
| 2018 RGF | 308,300 | 337,600 | 351,800 | 363,300 | 374,100 | 384,800 | 395,000 | N.A. |
| % Change | | 10% | 4% | 3% | 3% | 3% | 3% | N.A. |
| 2022 RGF | | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 |
| % Change | | | 8% | 1% | 2% | 2% | 2% | 2% |

Sources: Data for years 2010 and 2015 are from the California Employment Development Department.

*In the 2022 RGF, data for 2015 were re-benchmarked using updated estimates from the California Employment Development Department, an employer database InfoUSA, and extensive ground-truthing. Forecast years were prepared by AMBAG and PRB.

Figure 2: AMBAG Region Employment Forecast

Sources: Data for years 2010-2014 are from the California Employment Development Department. In the 2022 RGF, data for 2015 were re-benchmarked using updated estimates from the California Employment Development Department, an employer database InfoUSA, and extensive ground-truthing. Forecast years were prepared by AMBAG and PRB.

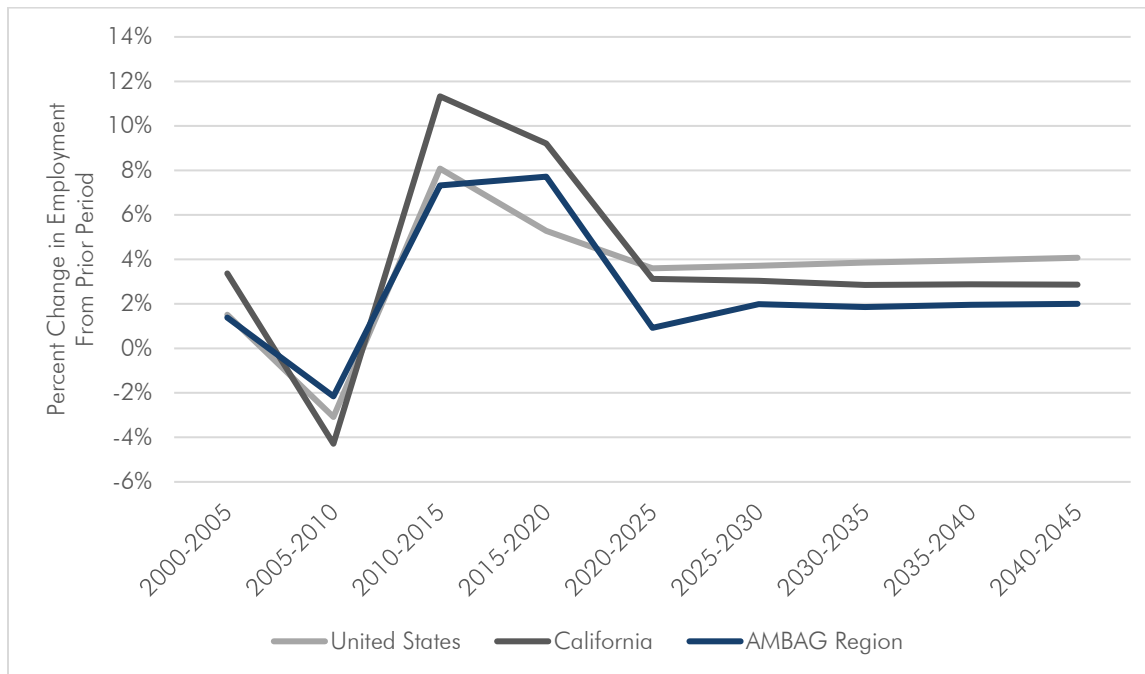
Job projections to 2045 were developed for each major NAICS industry category by projecting the AMBAG region share of state job growth based on the analysis of trends in the period from 2005 to 2019. The NAICS industries were then grouped into major industry sectors for the transportation model. Industry categories are described in Attachment 2.

The AMBAG region experienced job growth slower than the state, and similar to the nation between 2000 and 2019. (See Figure 3.) The region is projected to experience job growth at a slightly slower rate than the state and nation. The primary reason for this below-average job growth is the region's below-

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average concentration in fast-growing sectors such as information and professional services. The region also has a below-average exposure to growth in foreign trade.

Figure 3: Employment Change



Sources: Data for years 2000-2015 from the U.S. Bureau of Labor Statistics and California Employment Development Department. Forecast years were prepared by AMBAG and PRB with input from U.S. Bureau of Labor Statistics, Employment by Major Industry Sector: 2014-2024; California Department of Transportation, California County-Level Economic Forecast 2014-2040, September 2014; and from the California Employment Development Department, Industry Employment Projections.

Positive growth factors include above-average performance relative to state trends in tourism and agriculture. Agriculture has shown strong growth for several years, and new crops such as cannabis as well as new investments in processing facilities, portend that the industry will continue to grow. However, any job growth due to new crops may be mitigated by losses due to increased mechanization in agriculture and agricultural processing.

Method for Producing the Employment Forecast

The AMBAG region job projections were developed using three guiding principles:

1. The AMBAG region projections were based on projections of job growth in the nation and state. The national and state projections provide the **pool of job opportunities** and the AMBAG region projections reflect historical trends in the **share** of national and state job growth that will locate in the AMBAG region.

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2. The AMBAG region **share** of national and state job growth is determined by the industry composition of job growth and the projected share of job growth locating in the AMBAG region. If national and state job growth is concentrated in sectors where the AMBAG region has a competitive advantage, the region's projected job growth will be higher than if national and state job growth is concentrated in sectors where the region has a below-average share of jobs and a relatively poor competitive position.
3. The analysis of competitive advantage is focused on sectors in the AMBAG region **economic base**. The region's economic base consists of those sectors that sell a high proportion of goods and services to customers outside the region. They export goods and services to customers in world and national markets and markets throughout California. Key examples of economic base sectors in the AMBAG region are agriculture and tourism. The UC Santa Cruz campus and state prison are also examples of activities that do not primarily serve local residents.

U.S. and California Job Growth to 2045

The starting point for the AMBAG projections is an examination of future U.S. and California job growth for total jobs and major industry sectors. The U.S. job growth projections are based on the most recent forecast from the U.S. Bureau of Labor Statistics and an extrapolation of growth trends to 2045. California job growth projections are based on an industry-level forecast published by the California Department of Transportation, as well as data from the California Employment Development Department and PRB.

The California industry projections identify the structure of job growth as an input to AMBAG region job projections. The resulting projections of job growth are shown below.

The nation is expected to add 41 million jobs between 2015 and 2045 for an increase of 27 percent. Growth, nationwide, is expected to be fairly constant throughout the forecast period. The state of California is projected to experience job growth that is slightly faster than the nation's job growth in the early years of the forecast and to slow down to a rate more similar to the national growth rate by 2045.

The state is projected to see a 26 percent increase in total jobs between 2015 and 2045. The pattern of California industry job growth is shown below and was used in developing AMBAG region job projections. (See Table 3)

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Table 3: California Jobs by Major Industry (000s)

| | 2010 | 2015 | 2020 | 2045 | Avg. Annual Growth Rate | | |
|---------------------------------------|-----------------|-----------------|-----------------|-----------------|-------------------------|-------------|-------------|
| | | | | | 2010-2015 | 2015-2020 | 2015-2045 |
| Agriculture | 382.8 | 422.3 | 426.8 | 433.1 | 2.0% | 0.2% | 0.5% |
| Mining | 24.6 | 26.4 | 22.8 | 23.8 | 1.4% | -2.9% | -2.1% |
| Construction | 560.0 | 732.1 | 892.9 | 996.2 | 5.5% | 4.1% | 6.4% |
| Manufacturing | 1,247.9 | 1,303.0 | 1,340.4 | 1,439.2 | 0.9% | 0.6% | 2.0% |
| Wholesale | 629.7 | 691.0 | 699.2 | 789.8 | 1.9% | 0.2% | 2.7% |
| Retail | 1,516.5 | 1,660.1 | 1,683.3 | 1,812.5 | 1.8% | 0.3% | 1.8% |
| Transp., Warehousing, Utilities | 466.9 | 557.8 | 682.2 | 717.9 | 3.6% | 4.1% | 5.2% |
| Information | 428.4 | 488.6 | 562.0 | 714.0 | 2.7% | 2.8% | 7.9% |
| Financial Serv. | 758.8 | 800.8 | 840.1 | 1,096.7 | 1.1% | 1.0% | 6.5% |
| Prof. & Business Serv. | 1,224.1 | 1,431.6 | 1,591.7 | 1,861.8 | 3.2% | 2.1% | 5.4% |
| Educ. & Health Serv. | 2,993.9 | 3,526.1 | 3,988.6 | 4,792.4 | 3.3% | 2.5% | 6.3% |
| Leisure & Hospitality | 1,500.8 | 1,828.3 | 2,056.8 | 2,348.2 | 4.0% | 2.4% | 5.1% |
| Other services (excl. gov't) | 483.6 | 543.6 | 583.3 | 797.4 | 2.4% | 1.4% | 8.0% |
| Government | 2,448.4 | 2,463.0 | 2,636.6 | 2,959.3 | 0.1% | 1.4% | 3.7% |
| Self Employed | 1,192.6 | 1,180.9 | 1,275.7 | 1,519.6 | -0.2% | 1.6% | 5.2% |
| Total Jobs | 15,859.0 | 17,655.6 | 19,282.4 | 22,301.7 | 2.2% | 1.8% | 4.8% |

Sources: Data for years 2005, 2010 and 2015 from the Employment Development Department. Forecast years were prepared by PRB with input from California Department of Transportation, California County-Level Economic Forecast 2018-2050, September 2019 and from the California Employment Development Department, California Industry Employment Projections.

The projections show substantial differences in the expected growth rate among industries between 2015 and 2045 and these differences tell a story about where job growth is expected and where job levels will remain flat or decline. These differences directly influenced the AMBAG region job projections described below.

It is important to note that the statewide projections listed above were completed before the start of the coronavirus pandemic. The net result is unknown at this time, and projections will be updated as new information becomes available. AMBAG will begin the next update to the Regional Growth Forecast will begin in 2023.

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The AMBAG Region Economy and Job Growth

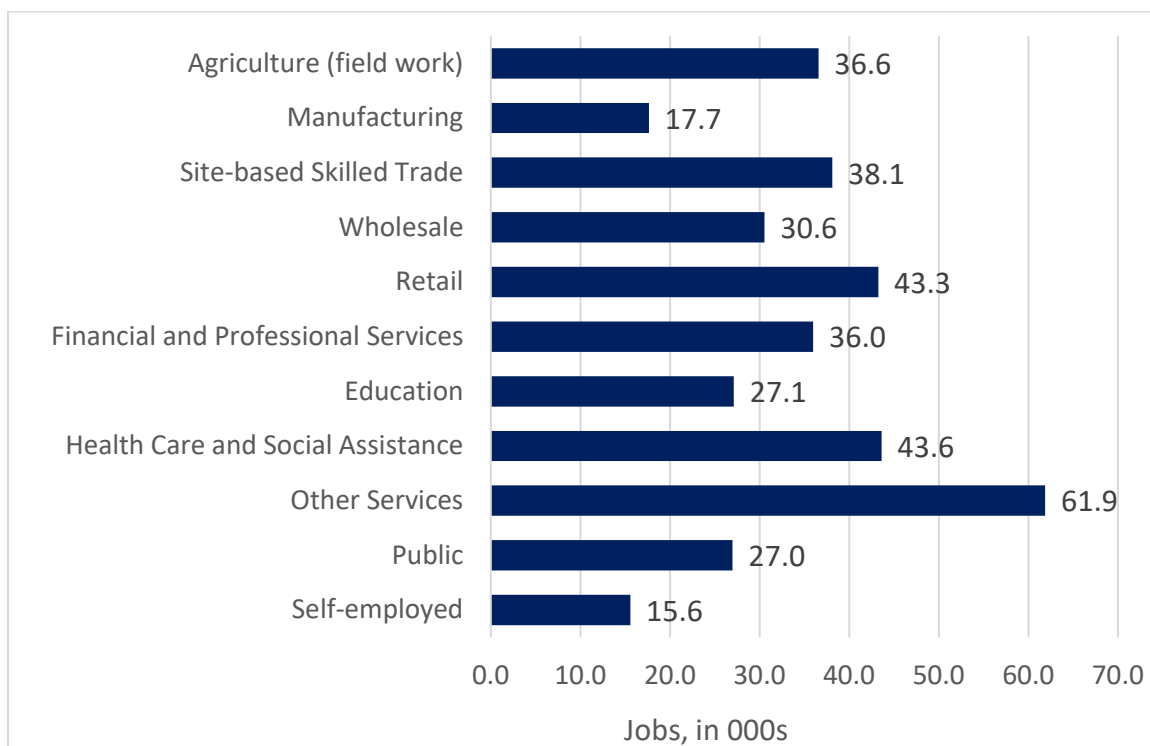
The previous section provided an overview of the current trends in the California economy. As previously noted the AMBAG region's job projections are based on an analysis of the regional economy and its relationship to the growth forecasted for California. The national and state projections provide the **pool of job opportunities** and the AMBAG region forecast reflects judgments about the **share** of national and state job growth that will locate in the AMBAG region. What follows is a description of the current structure of the regional economy as well as the resulting job projections based on the region's share of industries.

The database used for analysis and projections consists of annual industry employment data from 1990 through 2019, from the California Employment Development Department. for each of the three counties in the region and added together to produce an AMBAG region jobs database.

In addition to the historical time-series, AMBAG re-benchmarked the 2015 employment data to more accurately reflect local employment, and grouped the data to eleven categories for modeling purposes. This process is described in more detail in the "Sub-County Employment Database and Re-benchmarking" section, below. Industry definitions are included in Attachment 2.

The largest sectors are Other Services (including hotels, restaurants, and personal services), Health Care and Social Assistance, and Retail. (See Figure 4.)

Figure 4: Jobs by Industry Sector in 2015, AMBAG Region



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Sources: Data from the California Employment Development Department, InfoUSA, and AMBAG.

The AMBAG regional economy has an industry structure that is quite different in some ways than the statewide structure or the industry structure in regions like Southern California or the San Francisco Bay Area. One difference is the large share of jobs in Agriculture. Nineteen percent of total jobs in the AMBAG region are in Agriculture compared to just over two percent statewide. Other sectors with above average shares in the region include Public, Other Services, and Self Employed. Conversely, the AMBAG region has a below average share of jobs in the fast-growing, high wage Financial and Professional Services sectors.

AMBAG Region Forecast Job Trends, by Industry

The AMBAG region is expected to have moderate job growth between 2015 and 2040.

Table 4: AMBAG Region Jobs by Major Industry (000s)

| | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Avg. Annual Growth Rate | |
|--|---------|---------|---------|---------|---------|---------|---------|-------------------------|-----------|
| | | | | | | | | 2015-2020 | 2015-2045 |
| Agriculture | 36,600 | 40,100 | 40,100 | 40,200 | 40,300 | 40,500 | 40,600 | 1.8% | 0.3% |
| Manufacturing | 17,700 | 19,700 | 19,800 | 19,900 | 20,000 | 20,100 | 20,200 | 2.2% | 0.3% |
| Site-based Skilled Trade | 38,100 | 42,900 | 43,700 | 44,900 | 45,600 | 46,600 | 47,700 | 2.4% | 0.6% |
| Wholesale | 30,600 | 33,300 | 32,800 | 33,200 | 33,500 | 33,800 | 34,100 | 1.7% | 0.3% |
| Retail | 43,300 | 42,100 | 42,200 | 42,500 | 43,000 | 43,500 | 44,000 | -0.6% | 0.0% |
| Financial and Professional Services | 36,000 | 37,100 | 37,400 | 38,500 | 39,600 | 40,800 | 41,900 | 0.6% | 0.4% |
| Education | 27,100 | 29,900 | 30,100 | 30,700 | 31,400 | 32,200 | 33,100 | 2.0% | 0.5% |
| Healthcare and Social Assistance | 43,600 | 47,400 | 48,900 | 50,200 | 51,500 | 52,900 | 54,400 | 1.7% | 0.6% |
| Other Services | 61,900 | 68,500 | 69,100 | 71,200 | 73,200 | 75,200 | 77,300 | 2.0% | 0.6% |
| Public | 27,000 | 29,700 | 29,800 | 30,200 | 30,700 | 31,200 | 31,900 | 1.9% | 0.4% |
| Self-employed | 15,600 | 15,700 | 16,200 | 16,600 | 16,900 | 17,300 | 17,700 | 0.1% | 0.3% |
| Total | 377,300 | 406,300 | 410,000 | 418,100 | 425,800 | 434,100 | 442,800 | 1.5% | 0.4% |

Sources: Data for years 2015 from the California Employment Development Department, InfoUSA, and AMBAG. Forecast years were prepared by AMBAG and PRB.

Note: Parts may not sum to total due to independent rounding.

The industry-level trends in the AMBAG Region are as follows:

- Agricultural job growth has been strong for the past 10 years, and while the rate of growth is expected to slow, the region's agricultural industry will still grow faster than state or national projections.
- The region lost Manufacturing jobs during the recession, but recent years have seen a turnaround. Growth is expected to be slow but steady in future years.

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- Site-based Skilled Trade (which includes construction) saw steep job losses during the recession and a bounce-back through 2019. Future growth is expected to be moderate.
- The Wholesale and Retail sectors both lost jobs in recession years, and retail has continued to decline. Growth is expected to remain low through the forecast.
- Financial and Professional Services is expected to grow at a moderate rate.
- Education has grown rapidly in recent years, but growth will likely slow as population growth slows.
- Healthcare and Social Assistance has seen steady growth, even in recession years. This is expected to continue as the population ages and demand for health services increases.
- Other Services (including hotels, restaurants, and personal services) lost jobs in the AMBAG region during the recession, but growth rebounded between 2010 and 2015. Growth is expected to be moderate in the future.
- The Public sector, locally, lost jobs between 2008 and 2013 as a result of the recession. Those losses began to reverse in 2014, and the sector is expected to see modest growth in the future.
- Self-employment tends to be counter-cyclical as people who lose their wage-and-salary job during a recession may turn to self-employment. Growth forecasts are based primarily on population growth.

Step 2: Population

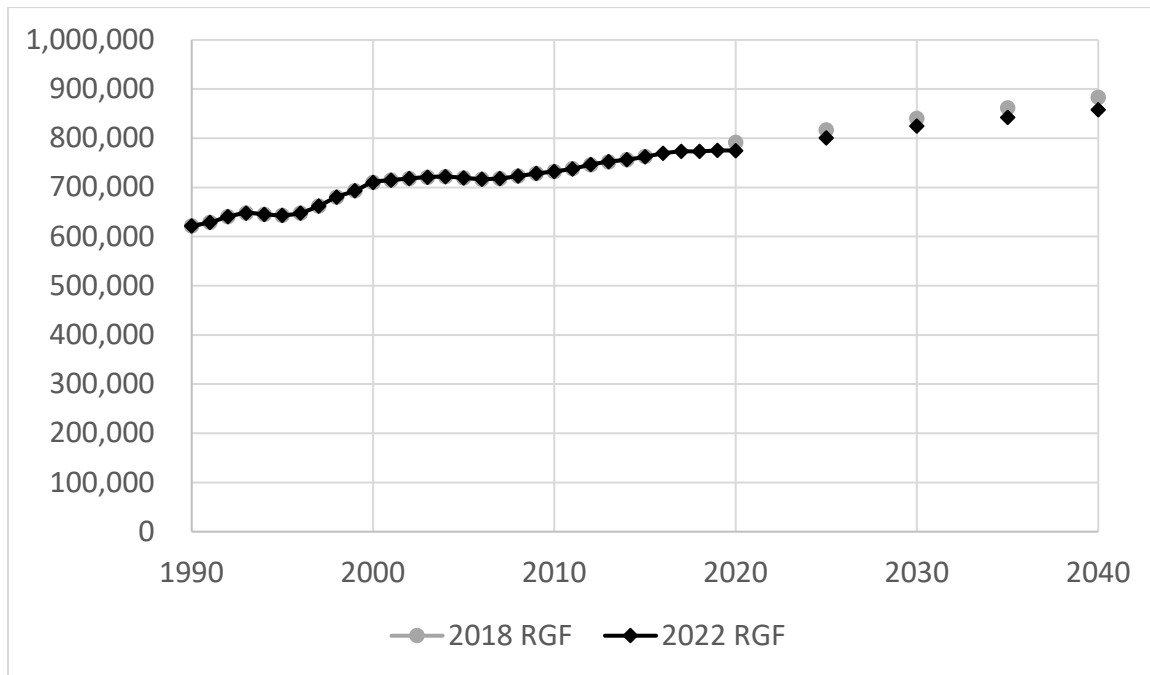
The region is projected to add approximately 107,500 people between 2015 and 2045, for an increase of 14 percent. The 2045 projected regional population of 869,776 is lower than the 883,300 residents projected for year 2040 in the 2018 RGF. (See Table 5 and Figure 6) This lower population forecast reflects slower growth than anticipated since the 2010 Census due to record low birth rates, stalled improvements in life expectancy, and lower migration rates. This slower growth in population is possible, despite faster growth in employment, due to changing unemployment and labor force participation rates.

Table 5: Comparison of Forecasts for Population

| Forecast | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 |
|-----------------|---------|---------|---------|---------|---------|---------|---------|---------|
| 2018 RGF | 732,708 | 762,676 | 791,600 | 816,900 | 840,100 | 862,200 | 883,300 | N.A. |
| % Change | | 4% | 4% | 3% | 3% | 3% | 2% | N.A. |
| 2022 RGF | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 |
| % Change | | 4% | 2% | 3% | 3% | 2% | 2% | 1% |

Sources: Data for years 2010-2020 are from the California Department of Finance. Forecast years were prepared by AMBAG and PRB.

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Figure 5: AMBAG Region Population Forecast

Sources: Data for years 1990-2020 are from the California Department of Finance. Forecast years were prepared by AMBAG and PRB.

Despite the lower population forecast, it is expected that AMBAG will continue to see population and housing growth associated with job growth outside of the region. In particular, job growth in Silicon Valley, combined with high housing prices, is expected to lead to an increase in the number of commuters to Bay Area jobs that live in the AMBAG region.

Method for Producing the Population Forecast

In preparing for this forecast, PRB tested a variety of methods for the population forecast, each of which produced similar results. (Findings are summarized in Attachment 3.) As a result of this review, PRB and AMBAG staff determined that the employment-driven population growth forecast model used in the 2014 RGF was suitable for the 2018 RGF.

Benchmark Population

All population projections are benchmarked to the 2010 Census counts which include people whose primary residence on “Census Day” (April 1, 2010) is within the region, regardless of citizenship status. It is recognized that the AMBAG region is home to a sizeable seasonal population (seasonal workers, who often work in agricultural occupations, and their families). Seasonal worker populations have

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historically been found to be “hard to count” (HTC) in official statistics.¹ In an encouraging development, the 2010 Census was more effective than prior decennial census efforts in reaching, and enumerating, HTC areas. Specifically, “Census 2010 coverage of households in the HTC tracts in the San Joaquin Valley and Central Coast counties... was significantly improved from previous decennials,” but some undercount remained a problem.²

The timing of data collection has also historically been a challenge for counting seasonal workers in the AMBAG region. Migratory workers are counted based on their location on Census Day. If the agricultural work cycle is in a lull in March and April, but ramps up at other times of the year, the worker population may be lower on Census Day than it is at other times of the year. However, it has been observed through informal surveys (i.e., for the AMBAG Regional Agricultural Vanpool Feasibility Study) that the seasonal population in the AMBAG region has been moving towards a trend of year-round residence, particularly with regard to agricultural jobs.

Given these two trends – better enumeration of HTC populations and a trend toward year-round residence – the seasonal population is increasingly likely to be counted in the decennial Census and in California Department of Finance demographic estimates. That said, seasonal workers who were not present on Census Day would not have been counted in the AMBAG region, and undercount remains a problem for seasonal populations, nationwide. Thus, to the extent that seasonal workers are present and counted in official statistics, they are also included in this forecast.

The AMBAG region population projections were benchmarked against prior decennial Census and employment data, and derived by anticipating that the regional population to job ratio will move in line with the statewide trend as it has in the past.

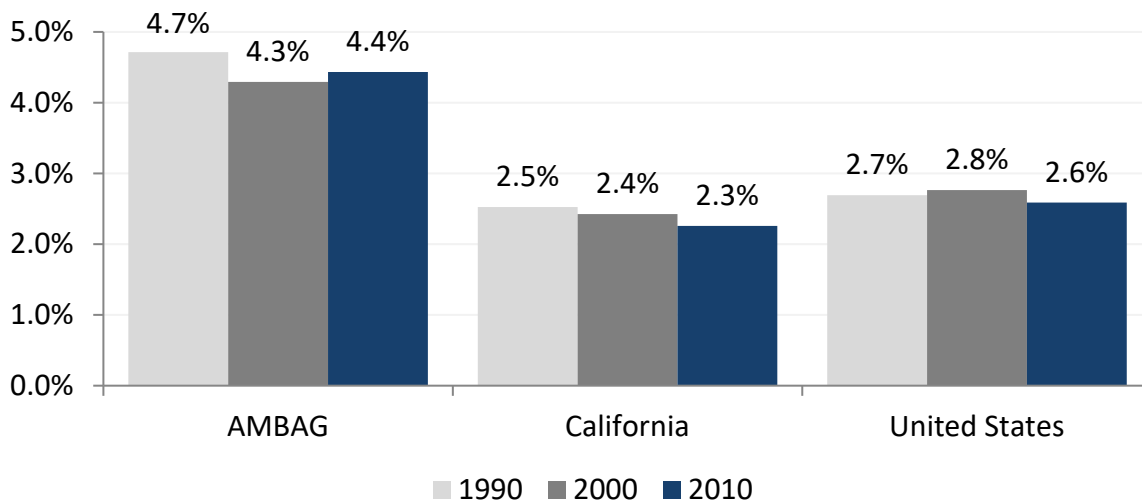
U.S., California and AMBAG Region Demographic and Economic Trends to 2045

The AMBAG region has an above-average share of residents who live in group quarters and are not tied to the regional job market. This trend has continued since 1990 although the mix of group quarters residents has changed. (See Figures 6 and 7.) Changes in group quarters population, such as growth at the region’s universities, will play a role in regional growth through 2045.

¹ U.S. General Accounting Office. “Key Efforts to Include Hard-to-Count Populations Went Generally as Planned; Improvements Could Make the Efforts More Effective for Next Census” (December 2010), accessed at <http://www.gao.gov/new.items/d1145.pdf> on October 4, 2016.

² California Rural Legal Assistance, Inc. “2010 Census Enumeration of Immigrant Communities in Rural California: Dramatic Improvements but Challenges Remain” (November 2010), accessed at <http://www.crla.org/sites/all/files/content/uploads/Census/Census10-JBS-CRLA.pdf> on October 4, 2016.

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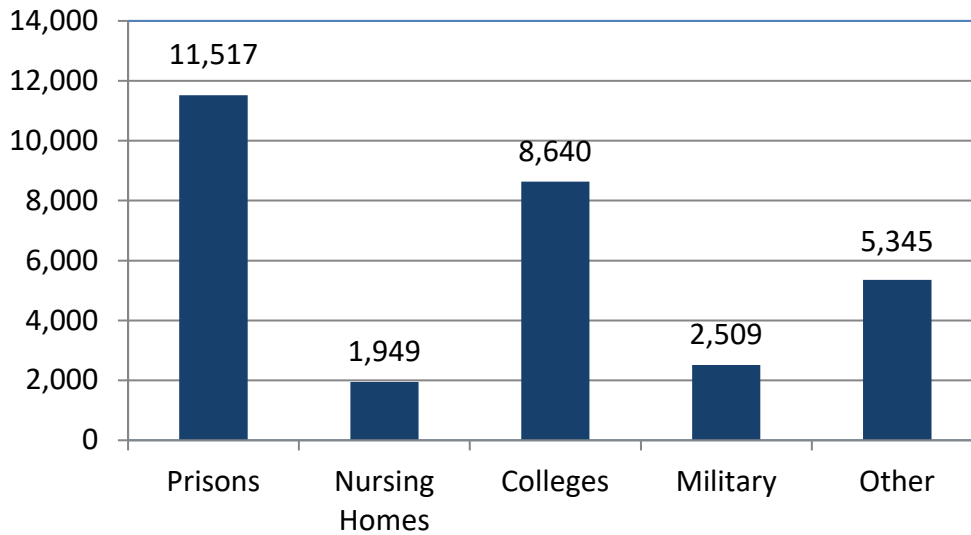
Figure 6: Group Quarters as a Percent of Population

Sources: U.S. Census Bureau, California Department of Finance

In 1990 there was a substantial military group quarters presence around the Fort Ord base. Since then the military population has declined due to the closure of the base, but that group quarters population has been offset by an increase at colleges (primarily UC Santa Cruz and CSU Monterey Bay) and an increase in the state prison population. In future years it will be important to continue watching the development and growth of military institutions in the region. There is still a strong military and naval presence in Monterey County including the Presidio area as well as Fort Hunter Liggett in the southern portion of the County.³

³ While Fort Hunter Liggett has a small permanent population, they are a large training facility and host a substantial amount of trainees every year. Not only will it be important to follow the FHL plans for expansion from a population perspective, but it will also be important to consider the presence of the FHL in transportation planning given the Fort's heavy reliance on Highway 101.

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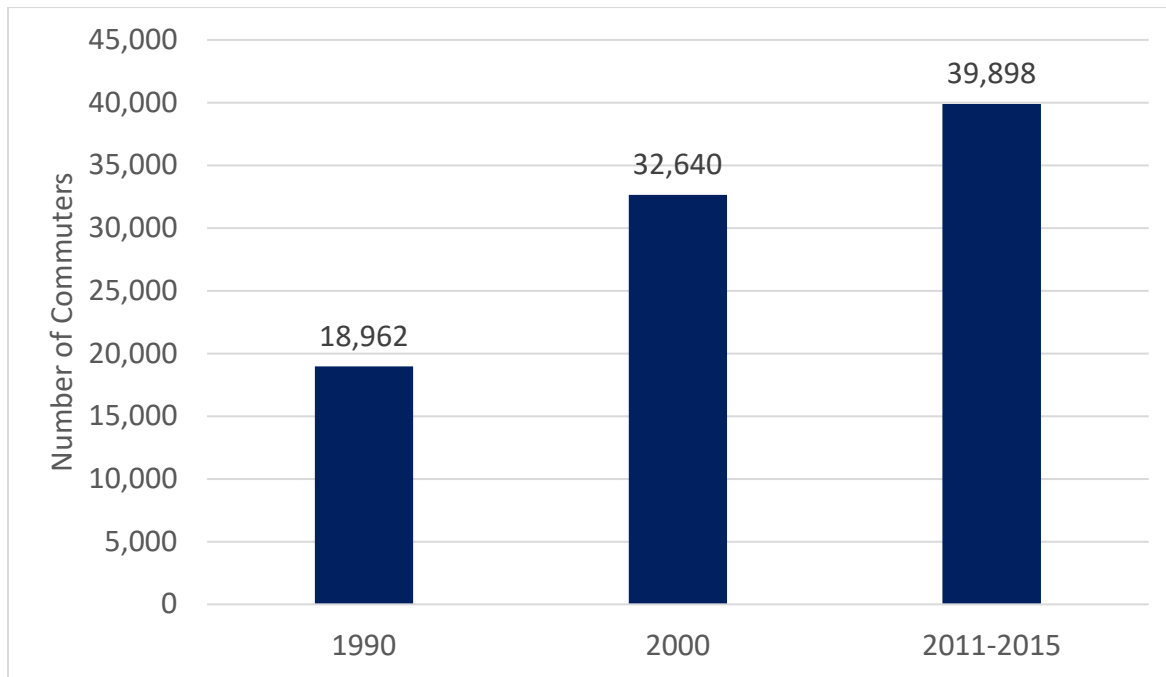
Figure 7: AMBAG Group Quarters Population in 2010

Source: U.S. Census Bureau, Census 2010

The AMBAG region, the state, and the nation all have about 2 residents per job, and that is expected to continue to 2045.

AMBAG residents commute to jobs outside the region, principally to jobs in Santa Clara County. This net out-commuting means there are residents in the region not connected to AMBAG region job growth. Net out-commuting surged between 1990 and 2000 as the “dot.com boom” pushed Silicon Valley (Santa Clara County) job levels higher, and has continued to rise as people to search for cheaper housing in portions of the AMBAG region. (See Figure 8.)

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Figure 8: Net Out-Commuting from AMBAG Region

Sources: 1990 & 2000 - Census Journey to Work and 2011-2015 - American Community Survey Special Tabulations for the Census Transportation Planning Package.

AMBAG Region Forecast Population Trends

As described above (see Table 5), the region is projected to add approximately 2,700 residents per year between 2015 and 2045. This is less than the average of just under 8,900 between 1990 and 2000 and above the recession-affected growth of 2,200 between 2000 and 2010. Recent growth from 2015-2020 has averaged 2,500 per year, close to the projected long-term growth rate.

Step 3: Housing and Households

The region is projected to add approximately 42,200 housing units by 2045, for a total of approximately 304,900 for an increase of 16 percent. The 2045 projected regional housing stock of 304,900 is slightly higher than the 305,293 housing units projected for year 2040 in the 2018 RGF, reflecting slower population growth.

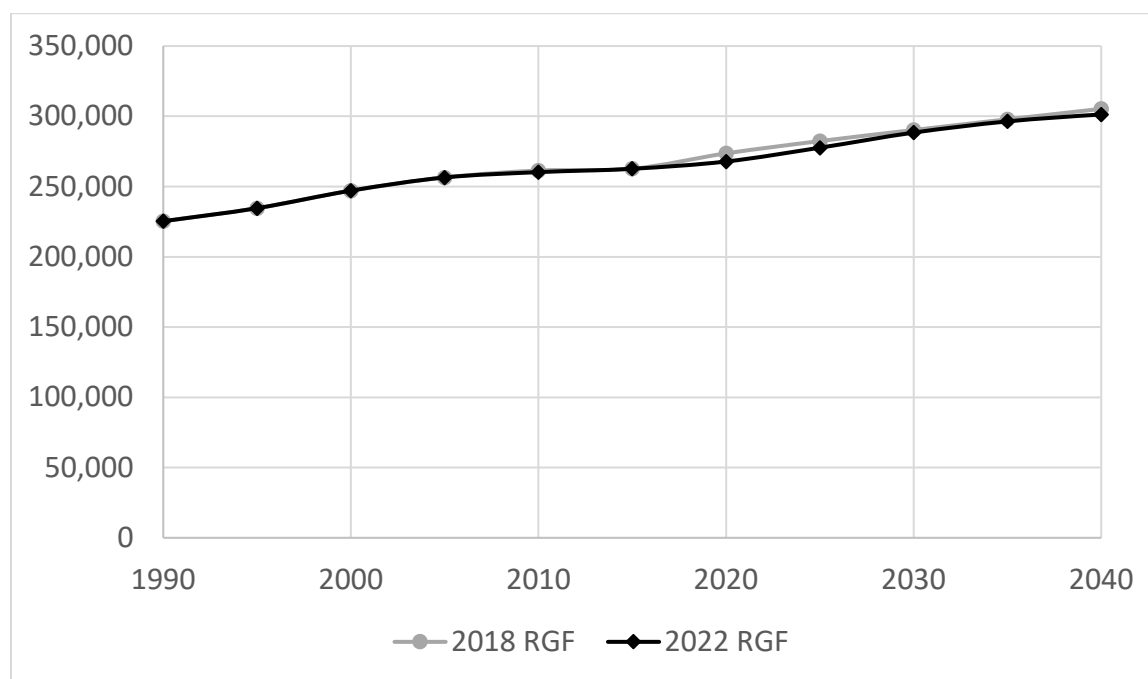
Table 6: Comparison of Forecasts for Housing

| Forecast | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 |
|-----------------|---------|---------|---------|---------|---------|---------|---------|---------|
| 2018 RGF | 261,394 | 262,660 | 273,606 | 282,368 | 290,225 | 297,851 | 305,293 | N.A. |
| % Change | | 0% | 4% | 3% | 3% | 3% | 2% | N.A. |
| 2022 RGF | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 |
| % Change | | 1% | 2% | 4% | 4% | 3% | 2% | 1% |

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Sources: Data for years 2010-2020 are from the California Department of Finance. Forecast years were prepared by AMBAG and PRB.

Figure 9: AMBAG Region Housing Forecast



Sources: Data for 1990-2020 from the California Department of Finance. Forecast years were prepared by AMBAG and PRB.

Method for Producing the Housing Forecast

The housing forecast begins with a household forecast, and the household forecast is driven by demographic factors such as the size and structure of the population. Demographic factors (e.g., gender, age, and race/ethnicity) and external factors (e.g., major group quarters facilities like colleges and universities, correctional facilities, etc.) influence household population and household formation rates (i.e., the number of people per household). Household formation rates predict future demand for housing. That predicted demand, combined with expected vacancy rates, drives the forecast for housing growth.

AMBAG Region Forecast Housing Trends

As described above (see Table 5), the region is projected to add approximately 2,700 residents per year between 2015 and 2045. Taking average household size and vacancy rates into account, the resulting housing growth is expected to be just over 1,000 per year between 2015 and 2045. This is similar to the recent growth of 1,000 housing units per year between 2000 and 2015.

It is worth noting that several jurisdictions in the AMBAG region have historically had relatively high vacancy rates, reflecting a mix of vacation rentals and second homes, particularly in coastal

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communities. In recent years, there is some evidence that more homeowners may be participating in the vacation rental market via platforms such as Airbnb and VRBO. It is unclear whether these new services will result in higher vacancy rates as more housing units become primarily vacation rentals or lower vacancy rates as short-term rental units shift demand away from units that are intended to be available for rental most (or all) of the year. AMBAG will continue to monitor this trend for future forecasts.

Section 3: Development of the Subregional Forecast

Following the preparation of the regional forecast figures, AMBAG staff began the process of disaggregating the figures to the county and city level using historical data. This section summarizes that process and the results.

Summary of the 2022 Subregional Forecast

The 2022 RGF projects that the region will add about 65,500 jobs between 2015 and 2045, for a total of just over 442,800 jobs by 2045. Of that growth, 58 percent (approximately 38,200 jobs) is expected to be in Monterey County, 7 percent (approximately 4,500 jobs) is expected to be in San Benito County and 35 percent (approximately 22,800 jobs) is expected to be in Santa Cruz County.

This forecast projects that the region's population will grow by approximately 107,500 people between 2015 and 2045, for a total population of just under 869,800 in 2045. Of that growth, 57 percent (approximately 61,100 people) is expected to be in Monterey County, 23 percent (approximately 25,200 people) is expected to be in San Benito County and 20 percent (approximately 21,200 people) is expected to be in Santa Cruz County.

To house the region's expected population growth, this forecast shows an increase of just over 42,200 housing units by 2045, for a total of approximately 304,900 units. Of that growth, 62 percent (approximately 26,200 houses) is expected to be in Monterey County, 18 percent (approximately 7,500 houses) is expected to be in San Benito County and 20 percent (approximately 8,600 houses) is expected to be in Santa Cruz County. Housing growth rates do not exactly parallel population growth rates because of local variations in average household size and vacancy rate, and because some population (e.g., at UCSC and CSUMB) is expected to be housed in group quarters facilities.

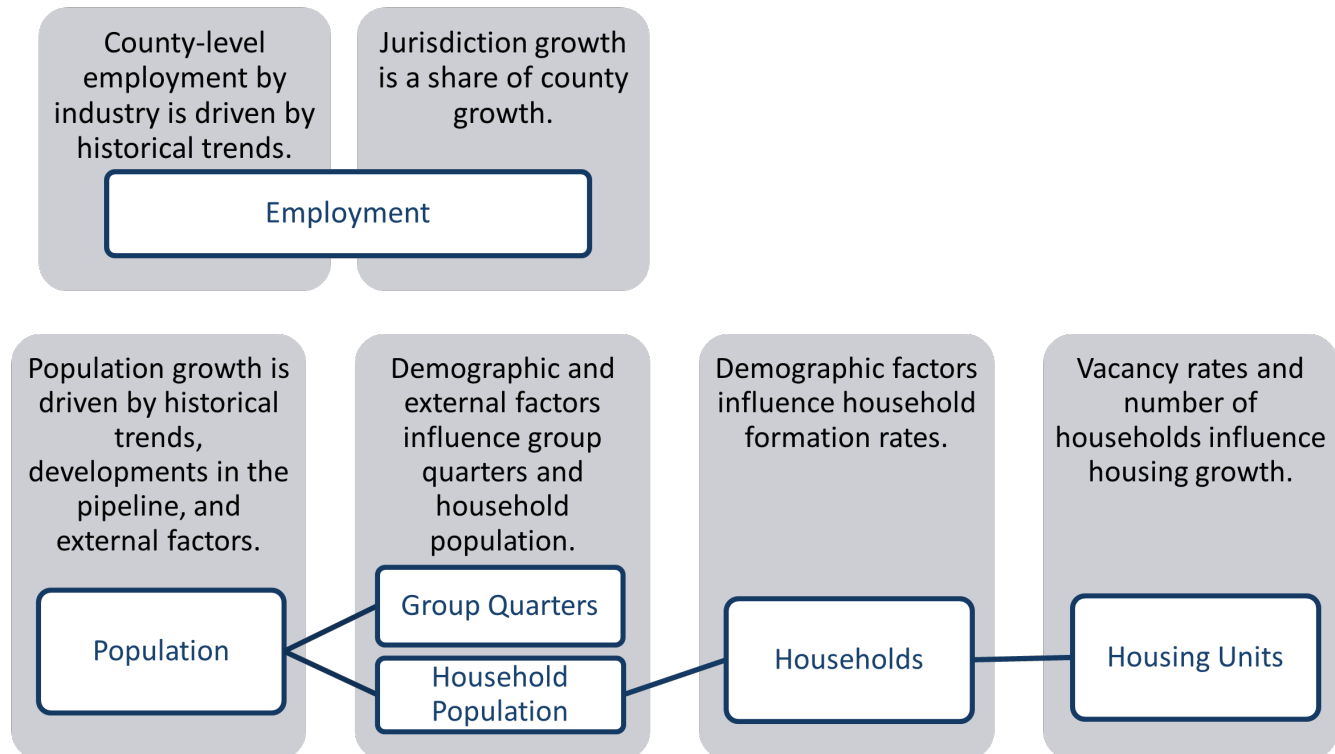
Details of the population, housing, and job growth forecasts for each jurisdiction, as well as population and housing forecasts for the two universities, can be found in Attachment 5.

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Subregional Allocation Methodology

Unlike the regional forecast, in which employment growth drives population and housing growth, the employment forecast is separate from the population and housing forecast in the subregional allocation. This separation reflects differing economic and demographic forces at the regional and local levels.

Figure 10: Subregional Allocation Process



1. **Employment trends:** Employment is measured as the number of jobs by place of work. For the county-level forecast, employment growth by industry is driven by historical trends (i.e., shift-share model). Total growth across the three counties is constrained by the region-level forecast. For each jurisdiction (cities and unincorporated balance of county), employment growth by industry is a constant share of the jurisdiction's parent county's growth in that industry.
2. **Population trends:** Population is the total resident population of the region. The jurisdiction level forecast is driven by three factors:
 - a. Historical trends (i.e., shift-share model)
 - b. Anticipated future developments such as housing projects under development that are likely to be occupied within the forecast horizon
 - c. External factors (e.g., universities, military, correctional facilities)

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Each county's population forecast is a sum of the jurisdiction-level forecasts. All levels (county, city, unincorporated area) are constrained by the region-level forecast.

3. Household Population and Group Quarters: Household population is the population that lives in a housing unit. Group quarters population is the population that lives in a group living arrangement such as a dorm, barracks, correctional institution, or congregate care facility. Demographic factors (e.g., age, race/ethnicity) and external factors (e.g., major group quarters facilities like colleges and universities, correctional facilities, etc.) influence the household population and household formation rates (i.e., the number of people per household).
4. Households/Occupied Housing Units: A household is a person, or group of people, living in a house. Because a household, by definition, occupies a housing unit, households are equivalent to and synonymous with occupied housing units.
Household projections are driven by household formation rates. Household formation rates are calculated as the ratio of households divided by the household population. Household formation rates are the inverse of average household size.
5. Housing Units: Housing is the total number of housing units, including both occupied and vacant structures. Housing includes primary residences, second homes, accessory dwelling units, vacation rentals, farmworker housing, and any other habitable structure—including unauthorized units. The only type of dwelling excluded from the housing inventory is group quarters (dorms, barracks, congregate care, etc.).
Housing projections are driven by the household population projection, demographic characteristics of the household population (age, sex, race/ethnicity), household formation rates, and housing vacancy rates. Vacancy rates are calculated as the share of all units (including vacation rentals, unauthorized dwellings, etc.) that are not currently occupied.

Data sources include the California Department of Finance, the California Employment Development Department, InfoUSA, and the U.S. Census Bureau.

For more information on the definitions of housing and group quarters, see Attachment 4.

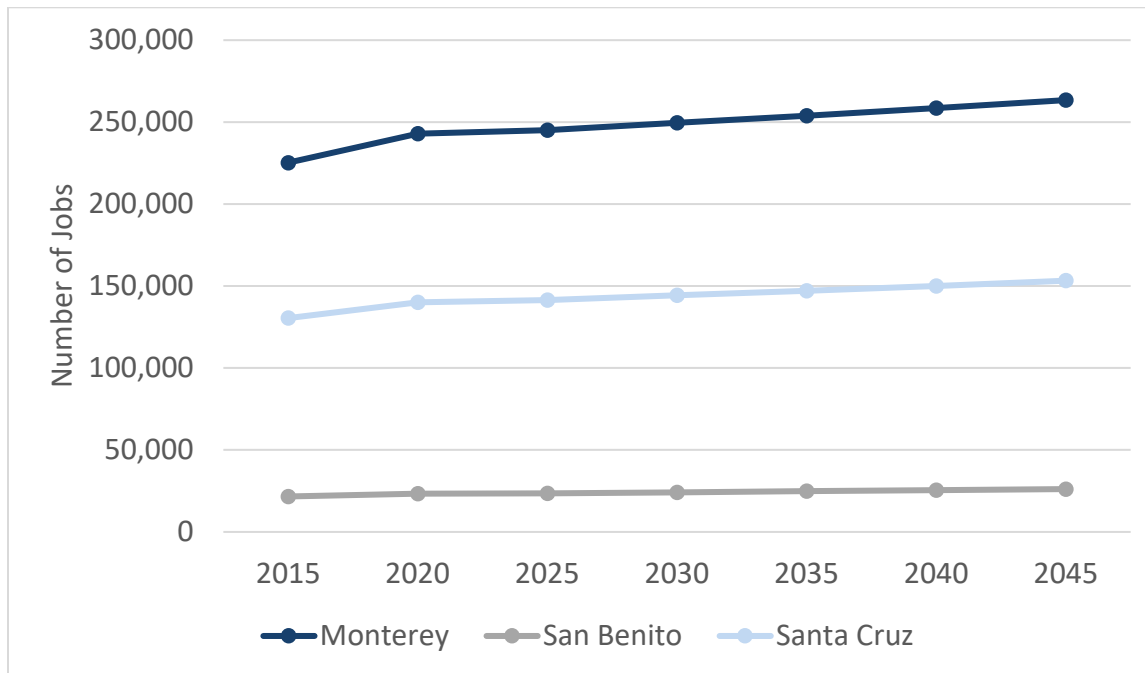
This process resulted in draft estimates at the jurisdictional level that were used for discussion purposes with staff at each of the cities and counties within the region. In addition to the cities and counties, staff met with the Local Agency Formation Commissions (LAFCOs) for each county, the Fort Ord Reuse Authority, the University of California, Santa Cruz (UCSC) and California State University, Monterey Bay (CSUMB) to discuss the results. Adjustments were made to the forecast based on these conversations to incorporate growth on the basis of planned developments, specific and General Plan research and economic development plans. The process of revision and meeting with local jurisdictions one-on-one was repeated several times to reach a consensus on the forecast.

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Step 1: Employment

The 2022 RGF projects that the region will add about 65,500 jobs between 2015 and 2045, for a total of just over 442,800 jobs by 2045. Of that growth, 58 percent (approximately 38,200 jobs) is expected to be in Monterey County, 7 percent (approximately 4,500 jobs) is expected to be in San Benito County and 35 percent (approximately 22,800 jobs) is expected to be in Santa Cruz County.

Figure 11: Employment by County 2015-2045



Sources: California Employment Development Department, InfoUSA, AMBAG, forecast by PRB and AMBAG.

Method for Producing the County and Sub-County Employment Forecast

The subregional employment forecast incorporated a two-step process: a county-level forecast and a jurisdiction-level allocation.

In order to disaggregate the tri-county regional industry employment forecast by county, AMBAG staff selected what is known as a Classical Shift-Share model. The Classical Shift-Share formula is similar to the Implicit Shift-Share formula used to disaggregate the population forecast, except that it is comprised of three mathematical functions rather than two. In this case, they are referred to as the regional share, industry mix and competitive shift functions. The regional share function estimates what employment growth in a certain industry would look like in the local area (i.e., county) if it were to grow at the same rate as the total all-industry employment in the region as a whole. The second industry mix function then adjusts for the difference in the rate of employment growth in a certain industry, compared to all industry employment. The industry mix function is calculated using regional

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employment values. The third function, known as the competitive shift, adjusts the estimate to account for faster or slower industry employment growth in the county, compared to the region.

Figure 12: Classical Shift-Share Equation

$$E_i^{t+n} = E_i^t \left[\frac{R_A^{t+n}}{R_A^t} + \left(\frac{R_i^{t+n}}{R_i^t} - \frac{R_A^{t+n}}{R_A^t} \right) + \alpha \left(\frac{E_i^t}{E_i^{t-m}} - \frac{R_i^t}{R_i^{t-m}} \right) \right]$$

E = local Value R = Regional Value
 i = industry A = All industries

Sub-County Employment Database and Re-benchmarking

To produce the subregional employment component of the forecast and to support transportation modeling, AMBAG created an address-level database for all employers in the AMBAG region in 2015. The database combined industry employment data from the California Employment Development Department (EDD) with employer data from InfoUSA. The InfoUSA data are derived from dozens of sources including but not limited to postal records, white pages listings, new business registrations, utility connections, real estate data (deeds & assessments) and industry directories. The database is then verified and supplemented with regular phone surveys. InfoUSA database is used by many other regional Councils of Governments to conduct forecast work and is a reputable source of data.

Staff compared records from EDD with those from InfoUSA. Where both sources matched, one record was retained, unedited. Where records differed, staff conducted extensive research (using AMBAG's land use inventory, web-based investigation, and field research) to determine the proper industry code and employment level for the record and retained the most accurate record (typically the higher reported number). As a result of the editing and reconciliation process, the address-level inventory differs from EDD industry totals.

While there are differences across all industries, edits to agricultural records were extensive. Staff review of address-level records showed that many establishments listed as "agriculture" by EDD are, in the AMBAG region, engaged in food processing (manufacturing), storage (warehousing), or retail (farm stands). Agricultural recategorization is described in more detail in Attachment 2.

It is also important to note that the AMBAG estimate of agricultural jobs differs from estimates of the agricultural workforce (91,433 in 2016) described in "Farmworker Housing Study and Action Plan for Salinas Valley and Pajaro Valley." The reasons for this difference are both temporal and definitional. The industry estimates are annual-average estimates of jobs (a job is a paid position at a company) for 2015. The Farmworker Housing Study figures are 2016 estimates of all workers who were ever employed during the year, including those who worked part-time or part-year. If a company has high turnover or seasonal work, that company's number of workers (all year) would be higher than their average number of jobs. For example, if a company typically has 10 paid positions, but in peak season brings on another 10 for three months, the annual average number of jobs is 12.5 (10 x (9/12months) +

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$20 \times (3/12\text{months}) = 12.5/\text{month}$) but there were 20 unique workers at peak (original 10 plus additional 10).

Thus, in this case, the farmworker study estimates are higher than jobs estimates for three key reasons:

- Agricultural employment grew slightly between 2015 and 2016.
- Worker estimates take peak seasonal employment into account, while EDD industry estimates are annual averages.
- Some companies that identify as agricultural are more accurately classified as food processing (manufacturing), storage (warehousing), or retail (farm stands).

Sub-County Disaggregation Method for Employment

The address-level database, described above, was used to calculate the share of employment for each industry in each jurisdiction in 2015. This percent share was then carried forward to future years in order to calculate the number of jobs located in each jurisdiction by industry. While the County level totals use the Classical Shift-Share method as described above, the sub-county level forecast is a constant share approach. However, because the sub-county level forecasts are based on the County totals by industry the Classical Shift-Share method does influence the sub-county trends.

A preliminary draft forecast was distributed to planning staff at each jurisdiction. AMBAG staff held one-on-one meetings to gather comments and additional information from planning staff at each jurisdiction. (See Attachment 1 for a list of meeting dates, times, locations and attendees.) Staff then used economic studies, entitled development, the establishment of enterprise zones and other information from local planners to supplement the employment assumptions at the jurisdictional level. These comments and additional pieces of information were incorporated into the final forecast.

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Table 7: Subregional Employment Forecast

| Geography | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Change 2015-2045 | |
|--------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|------------|
| | | | | | | | | Numeric | % |
| AMBAG Region | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| Monterey County | 225,268 | 243,015 | 245,054 | 249,613 | 253,918 | 258,553 | 263,437 | 38,169 | 17% |
| Carmel-By-The-Sea | 3,353 | 3,566 | 3,593 | 3,674 | 3,752 | 3,833 | 3,915 | 562 | 17% |
| Del Rey Oaks | 705 | 748 | 753 | 774 | 794 | 815 | 834 | 129 | 18% |
| Gonzales | 5,764 | 6,326 | 6,382 | 6,533 | 6,660 | 6,788 | 6,920 | 1,156 | 20% |
| Greenfield | 7,227 | 7,882 | 7,948 | 8,061 | 8,177 | 8,298 | 8,423 | 1,196 | 17% |
| King City | 7,573 | 8,195 | 8,248 | 8,371 | 8,511 | 8,669 | 8,832 | 1,259 | 17% |
| Marina | 6,107 | 6,548 | 6,621 | 6,765 | 6,899 | 7,055 | 7,217 | 1,110 | 18% |
| Monterey | 38,133 | 40,989 | 41,527 | 42,506 | 43,452 | 44,465 | 45,509 | 7,376 | 19% |
| Pacific Grove | 7,470 | 8,016 | 8,061 | 8,152 | 8,244 | 8,343 | 8,445 | 975 | 13% |
| Salinas | 73,009 | 78,874 | 79,577 | 81,079 | 82,505 | 84,044 | 85,683 | 12,674 | 17% |
| Sand City | 1,966 | 2,092 | 2,102 | 2,151 | 2,188 | 2,224 | 2,259 | 293 | 15% |
| Seaside | 9,667 | 10,476 | 10,589 | 10,833 | 11,062 | 11,290 | 11,543 | 1,876 | 19% |
| Soledad | 8,532 | 9,010 | 9,079 | 9,161 | 9,235 | 9,333 | 9,462 | 930 | 11% |
| Unincorporated | 55,762 | 60,293 | 60,574 | 61,553 | 62,439 | 63,396 | 64,395 | 8,633 | 15% |
| San Benito County | 21,631 | 23,263 | 23,572 | 24,203 | 24,802 | 25,475 | 26,126 | 4,495 | 21% |
| Hollister | 14,428 | 15,492 | 15,728 | 16,207 | 16,655 | 17,121 | 17,613 | 3,185 | 22% |
| San Juan Bautista | 515 | 557 | 569 | 580 | 588 | 603 | 612 | 97 | 19% |
| Unincorporated | 6,688 | 7,214 | 7,275 | 7,416 | 7,559 | 7,751 | 7,901 | 1,213 | 18% |
| Santa Cruz County | 130,436 | 140,002 | 141,391 | 144,316 | 147,125 | 150,119 | 153,261 | 22,825 | 17% |
| Capitola | 11,666 | 12,250 | 12,376 | 12,633 | 12,902 | 13,181 | 13,454 | 1,788 | 15% |
| Santa Cruz | 40,840 | 43,865 | 44,317 | 45,594 | 46,863 | 48,203 | 49,636 | 8,796 | 22% |
| Scotts Valley | 9,458 | 10,109 | 10,185 | 10,345 | 10,489 | 10,637 | 10,797 | 1,339 | 14% |
| Watsonville | 26,403 | 28,514 | 28,765 | 29,156 | 29,505 | 29,896 | 30,303 | 3,900 | 15% |
| Unincorporated | 42,069 | 45,264 | 45,748 | 46,588 | 47,366 | 48,202 | 49,071 | 7,002 | 17% |

Sources: Data for 2015 from InfoUSA and the California Employment Development Department.

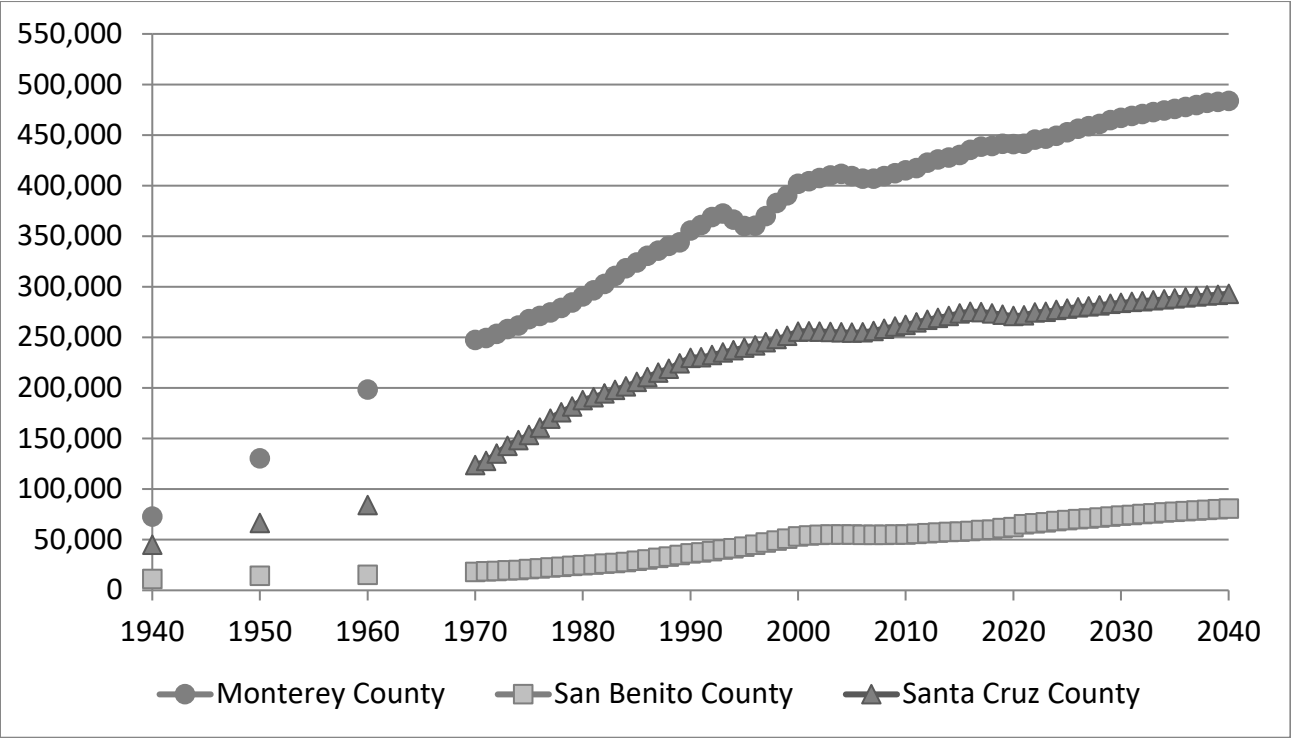
Forecast years were prepared by AMBAG and PRB.

Step 2: Population

This forecast projects that the region's population will grow by approximately 107,500 people between 2015 and 2045, for a total population of just under 869,800 in 2045. Of that growth, 57 percent (approximately 61,100 people) is expected to be in Monterey County, 23 percent (approximately 25,200 people) is expected to be in San Benito County and 20 percent (approximately 21,200 people) is expected to be in Santa Cruz County.

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Figure 13: Population in Monterey, San Benito and Santa Cruz Counties 1940-2045



Sources: Data for years 1940-2020 are from the U.S. Census Bureau and California Department of Finance. Forecast years were prepared by AMBAG and PRB.

2022 Regional Growth Forecast

Table 8: Subregional Population Forecast

| Geography | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | | % |
|--------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------|
| AMBAG Region | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| Monterey County | 430,310 | 441,143 | 452,761 | 467,068 | 476,028 | 483,884 | 491,443 | | 4% |
| Carmel-By-The-Sea | 3,854 | 3,949 | 3,946 | 3,954 | 3,964 | 3,974 | 3,984 | 130 | 3% |
| Del Rey Oaks | 1,663 | 1,662 | 1,693 | 1,734 | 1,859 | 2,330 | 2,650 | | 9% |
| Gonzales | 8,441 | 8,506 | 9,650 | 13,492 | 14,630 | 15,398 | 15,711 | 7,270 | 86% |
| Greenfield | 17,172 | 18,284 | 19,342 | 19,734 | 19,961 | 20,202 | 20,433 | | 9% |
| King City | 13,736 | 14,797 | 15,376 | 16,101 | 16,689 | 16,881 | 17,064 | 3,328 | 24% |
| Marina | 21,057 | 22,321 | 23,723 | 25,126 | 26,713 | 28,433 | 30,044 | | 3% |
| Marina balance | 20,037 | 21,371 | 22,293 | 22,841 | 23,238 | 23,768 | 24,237 | 4,200 | 21% |
| CSUMB (portion) | 1,020 | 950 | 1,430 | 2,285 | 3,475 | 4,665 | 5,807 | | 9% |
| Monterey | 28,086 | 28,170 | 28,044 | 28,650 | 29,032 | 29,342 | 29,639 | 1,553 | 6% |
| Monterey balance | 24,095 | 24,749 | 24,623 | 25,229 | 25,611 | 25,921 | 26,218 | | 9% |
| DLI & Naval Postgrad | 3,991 | 3,421 | 3,421 | 3,421 | 3,421 | 3,421 | 3,421 | -570 | -14% |
| Pacific Grove | 15,460 | 15,265 | 15,290 | 15,395 | 15,530 | 15,676 | 15,817 | | 2% |
| Salinas | 158,059 | 162,222 | 166,226 | 170,459 | 173,393 | 175,358 | 177,128 | 19,069 | 12% |
| Sand City | 361 | 385 | 430 | 516 | 756 | 1,012 | 1,198 | | 2% |
| Seaside | 33,815 | 33,537 | 34,497 | 35,107 | 35,634 | 36,582 | 38,316 | 4,501 | 13% |
| Seaside balance | 25,835 | 26,345 | 27,285 | 27,850 | 28,317 | 29,205 | 30,881 | | 0% |
| Fort Ord (portion) | 4,163 | 3,083 | 3,083 | 3,083 | 3,083 | 3,083 | 3,083 | -1080 | -26% |
| CSUMB (portion) | 3,817 | 4,109 | 4,129 | 4,174 | 4,234 | 4,294 | 4,352 | | 4% |
| Soledad | 24,597 | 25,301 | 26,112 | 26,824 | 27,697 | 28,419 | 29,133 | 4,536 | 18% |
| Soledad balance | 16,298 | 17,190 | 18,001 | 18,713 | 19,586 | 20,308 | 21,022 | | 9% |
| SVSP & CTF | 8,299 | 8,111 | 8,111 | 8,111 | 8,111 | 8,111 | 8,111 | -188 | -2% |
| Unincorporated | 104,009 | 106,744 | 108,432 | 109,976 | 110,170 | 110,277 | 110,326 | | 6% |
| Unincorp balance | 101,468 | 104,203 | 105,891 | 107,435 | 107,629 | 107,736 | 107,785 | 6,317 | 6% |
| CSUMB | 2,541 | 2,541 | 2,541 | 2,541 | 2,541 | 2,541 | 2,541 | | 0% |
| San Benito County | 58,138 | 62,353 | 69,324 | 73,778 | 77,638 | 80,788 | 83,366 | 25,228 | 43% |
| Hollister | 37,314 | 40,646 | 42,604 | 43,327 | 44,421 | 45,345 | 45,599 | | 2% |
| San Juan Bautista | 1,945 | 2,112 | 2,269 | 2,315 | 2,374 | 2,410 | 2,436 | 491 | 25% |
| Unincorporated | 18,879 | 19,595 | 24,451 | 28,136 | 30,843 | 33,033 | 35,331 | | 7% |
| Santa Cruz County | 273,793 | 271,233 | 278,641 | 284,146 | 288,523 | 293,156 | 294,967 | 21,174 | 8% |
| Capitola | 10,224 | 10,108 | 10,485 | 10,794 | 10,957 | 11,049 | 11,126 | | 9% |
| Santa Cruz | 64,223 | 64,424 | 68,845 | 72,218 | 75,257 | 78,828 | 79,534 | 15,311 | 24% |
| Santa Cruz balance | 46,947 | 45,324 | 47,845 | 49,118 | 49,957 | 50,828 | 51,534 | | 0% |
| UCSC | 17,276 | 19,100 | 21,000 | 23,100 | 25,300 | 28,000 | 28,000 | 10,724 | 62% |
| Scotts Valley | 11,946 | 11,693 | 11,718 | 11,837 | 11,867 | 11,868 | 12,010 | | 1% |
| Watsonville | 52,410 | 51,515 | 52,918 | 54,270 | 55,138 | 55,786 | 56,344 | 3,934 | 8% |
| Unincorporated | 134,990 | 133,493 | 134,675 | 135,027 | 135,304 | 135,625 | 135,953 | | 1% |

Sources: Data for 2015-2020 are from the California Department of Finance. Forecast years were prepared by AMBAG and PRB.

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Method for Producing the County and Sub-County Population Forecast

In order to disaggregate the tri-county regional population forecast, PRB and AMBAG implemented the Implicit Shift-Share method. This particular technique was chosen because it provides a relatively simple, yet rigorous, method for estimating the future geographic distribution of the regional population based on historic estimates of local and regional population growth.

The Implicit Shift-Share formula is comprised of two distinct mathematical functions. These are sometimes known as the regional share and the local shift. The regional share function calculates what the total population growth in the local area (i.e., a city or county) would be if that area were to grow at the same rate as the region as a whole. The second function then adjusts for historic changes in the local area's share of the total regional population. Combined with an accurate estimate of the size of the base population obtained from the 2010 Decennial Census, the regional share and local shift functions provide a reasonable estimate of the future local area population, taking into account past changes in the percentage share of the regional population. Historical data are from the Department of Finance. The Department of Finance does benchmark their historical estimates to the Decennial Census for 1990, 2000 and 2010.⁴

Figure 14: Implicit Shift-Share Equation

$$E^{t+n} = E^t \left(\frac{R^{t+n}}{R^t} \right) + \alpha R^{t+n} \left(\frac{E^t}{R^t} - \frac{E^{t-m}}{R^{t-m}} \right) \quad \begin{array}{l} E = \text{Local Value} \\ R = \text{Regional Value} \end{array}$$

To produce jurisdiction-level forecast, AMBAG and PRB compiled a database of historical population by jurisdiction. This database included information on population growth (or decline) as well as details for “special” populations (e.g., college students, military personnel, prisoners). (Special populations are described in more detail in the section “Adjustments for Special Populations,” below.)

AMBAG and PRB compiled historical data⁵ to track trends in, and relied upon institutional/facility plans to produce the population forecast for the following areas:

- Marina:
 - Fort Ord (portion)

⁴ Department of Finance, E-8 Historical Population and Housing Estimates for Cities, Counties and the State, 1990-2000, August 2008; Department of Finance, E-4 Population Estimates for Cities, Counties and the State, 2001-2010, September 2011 and Department of Finance, E-1 Population Estimates for Cities, Counties and the State, 2011 and 2012, August 2009.

⁵ Sources include the California Department of Finance, U.S. Census Bureau and institutional records.

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- CSUMB (portion)
- Monterey
 - Defense Language Institute and Naval Postgraduate School
- Seaside
 - Fort Ord (portion)
 - CSUMB (portion)
- Soledad
 - SVSP & CTF
- Balance of County
 - CSUMB (portion)
- Santa Cruz
 - UCSC

AMBAG and PRB then applied the implicit shift-share methodology to the balance of population in each jurisdiction to produce a draft of the first forecast increment. The benchmark period for the shift-share model was 2010-2015, and the model was applied to produce the draft forecast.

Forecast years, for this initial draft, presumed that each jurisdiction maintained a constant share of the region's population. This approach, using shift-share for the first increment, and constant-share thereafter, was implemented in the 2014 RGF and 2018 RGF to ensure that jurisdictions that experienced population loss during the benchmark period would not continue to decline. This forecast assumption is reasonable given that any jurisdiction may experience a period of temporary population decline, even when the long-term trend has been stability or growth.

Further initial adjustments were made to reflect population growth associated with housing under construction or in the permit pipeline.

AMBAG staff then met with representatives from each jurisdiction to ground truth the forecast with respect to anticipated future growth and development in the pipeline. (See Attachment 1 for a full list of meetings.)

Step 3: Housing

To house the region's expected population growth, this forecast shows an increase of just over 42,200 housing units by 2045, for a total of approximately 304,900 units. Of that growth, 62 percent (approximately 26,200 houses) is expected to be in Monterey County, 18 percent (approximately 7,500 houses) is expected to be in San Benito County and 20 percent (approximately 8,600 houses) is expected to be in Santa Cruz County. Housing growth rates do not exactly parallel population growth rates because of local variations in average household size and vacancy rate, and because some population (e.g., at UCSC and CSUMB) is expected to be housed in group quarters facilities.

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Table 9: Subregional Housing Forecast

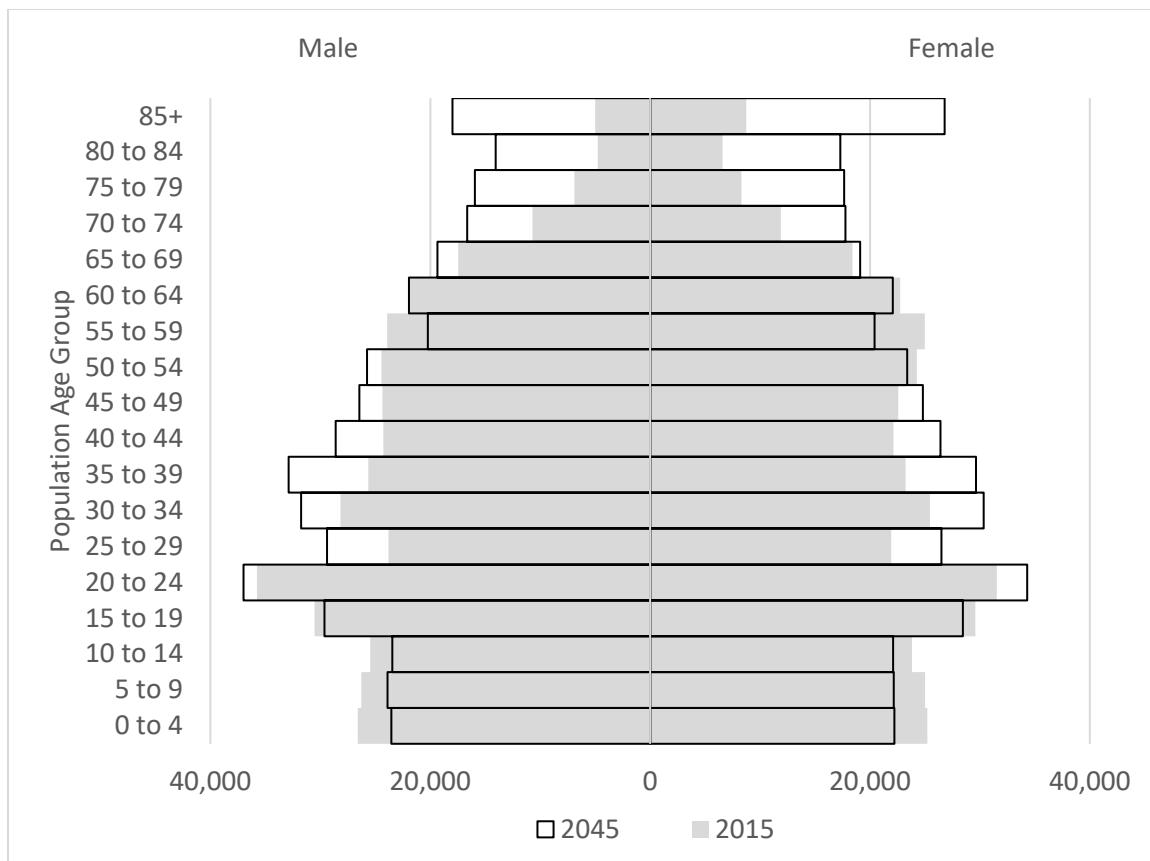
| Geography | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Change 2015-2045 | |
|--------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|------------|
| | | | | | | | | Numeric | % |
| AMBAG Region | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| Monterey County | 139,177 | 141,764 | 146,716 | 153,852 | 159,100 | 162,612 | 165,328 | 26,151 | 19% |
| Carmel-By-The-Sea | 3,417 | 3,437 | 3,437 | 3,442 | 3,450 | 3,453 | 3,459 | 42 | 1% |
| Del Rey Oaks | 741 | 741 | 762 | 809 | 848 | 1,052 | 1,195 | 454 | 61% |
| Gonzales | 1,987 | 1,987 | 2,399 | 3,630 | 4,182 | 4,474 | 4,626 | 2,639 | 133% |
| Greenfield | 3,794 | 3,981 | 4,359 | 4,766 | 5,047 | 5,164 | 5,238 | 1,444 | 38% |
| King City | 3,283 | 3,432 | 3,672 | 4,002 | 4,282 | 4,356 | 4,403 | 1,120 | 34% |
| Marina | 7,334 | 7,784 | 8,277 | 8,837 | 9,265 | 9,521 | 9,693 | 2,359 | 32% |
| Marina balance | 7,334 | 7,784 | 8,277 | 8,832 | 9,205 | 9,445 | 9,617 | 2,283 | 31% |
| CSUMB (portion) | 0 | 0 | 0 | 5 | 60 | 76 | 76 | 76 | -- |
| Monterey | 13,637 | 13,705 | 13,705 | 13,920 | 14,209 | 14,402 | 14,549 | 912 | 7% |
| Monterey balance | 13,205 | 13,273 | 13,273 | 13,488 | 13,777 | 13,970 | 14,117 | 912 | 7% |
| DLI & Naval Postgrad | 432 | 432 | 432 | 432 | 432 | 432 | 432 | 0 | 0% |
| Pacific Grove | 8,184 | 8,201 | 8,214 | 8,267 | 8,336 | 8,400 | 8,463 | 279 | 3% |
| Salinas | 43,001 | 43,411 | 45,552 | 48,673 | 50,968 | 52,229 | 53,150 | 10,149 | 24% |
| Sand City | 176 | 189 | 198 | 228 | 333 | 446 | 526 | 350 | 199% |
| Seaside | 10,913 | 10,920 | 11,437 | 11,925 | 12,248 | 12,604 | 13,192 | 2,279 | 21% |
| Seaside balance | 8,908 | 8,942 | 9,429 | 9,888 | 10,190 | 10,531 | 11,107 | 2,199 | 25% |
| Fort Ord (portion) | 1,119 | 1,119 | 1,119 | 1,119 | 1,119 | 1,119 | 1,119 | 0 | 0% |
| CSUMB (portion) | 886 | 859 | 889 | 918 | 939 | 954 | 966 | 80 | 9% |
| Soledad | 3,927 | 4,137 | 4,433 | 4,733 | 5,024 | 5,240 | 5,426 | 1,499 | 38% |
| Soledad balance | 3,927 | 4,137 | 4,433 | 4,733 | 5,024 | 5,240 | 5,426 | 1,499 | 38% |
| SVSP & CTF | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | -- |
| Unincorporated | 38,783 | 39,839 | 40,271 | 40,620 | 40,908 | 41,271 | 41,408 | 2,625 | 7% |
| Unincorp balance | 38,783 | 39,839 | 40,238 | 40,569 | 40,592 | 40,616 | 40,616 | 1,833 | 5% |
| CSUMB | 0 | 0 | 33 | 51 | 316 | 655 | 792 | 792 | -- |
| San Benito County | 18,262 | 19,913 | 21,721 | 23,333 | 24,773 | 25,452 | 25,775 | 7,513 | 41% |
| Hollister | 10,757 | 11,917 | 12,501 | 13,177 | 13,701 | 14,054 | 14,122 | 3,365 | 31% |
| San Juan Bautista | 750 | 819 | 878 | 918 | 951 | 965 | 975 | 225 | 30% |
| Unincorporated | 6,755 | 7,177 | 8,342 | 9,238 | 10,121 | 10,433 | 10,678 | 3,923 | 58% |
| Santa Cruz County | 105,221 | 106,135 | 109,208 | 111,201 | 112,479 | 113,243 | 113,797 | 8,576 | 8% |
| Capitola | 5,537 | 5,554 | 5,786 | 5,970 | 6,009 | 6,017 | 6,017 | 480 | 9% |
| Santa Cruz | 23,535 | 23,954 | 24,988 | 25,578 | 25,974 | 26,295 | 26,525 | 2,990 | 13% |
| Santa Cruz balance | 23,005 | 23,424 | 24,422 | 24,970 | 25,342 | 25,663 | 25,892 | 2,887 | 13% |
| UCSC | 530 | 530 | 566 | 608 | 632 | 632 | 633 | 103 | 19% |
| Scotts Valley | 4,691 | 4,739 | 4,798 | 4,846 | 4,869 | 4,887 | 4,930 | 239 | 5% |
| Watsonville | 14,131 | 14,226 | 14,829 | 15,629 | 16,108 | 16,347 | 16,519 | 2,388 | 17% |
| Unincorporated | 57,327 | 57,662 | 58,807 | 59,178 | 59,519 | 59,697 | 59,806 | 2,479 | 4% |

Sources: Data for 2015-2020 are from the California Department of Finance. Forecast years were prepared by AMBAG and PRB.

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Method for Producing the County and Sub-County Housing Forecast

In order to convert county level population forecast figures into the forecast of housing units, staff created a set of demographic profiles that describe the age, sex, race, and ethnicity characteristics of the future population. The basis for the demographic profiles is a set of detailed population projections developed by the California Department of Finance in 2019.⁶ The profiles were developed by calculating the share of total projected population within each county that may be attributed to each age, sex, race and ethnic category. The population age distribution for the AMBAG Region is shown in Figure 15 below. County-specific demographic patterns from the Department of Finance forecast were applied to AMBAG-projected total population for each county.

Figure 15: Population Size and Age Structure of AMBAG Region in 2015 and 2045

Source: 2015 data from the California Department of Finance, 2045 data from AMBAG and PRB.

⁶ In January 2020, DOF published State and County Population Projections. These have not been re-benchmarked to the 2020 Census.

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The first step toward translating the county demographic projections into forecasted housing was to subtract the group quarters population from the total population. (For an explanation of Group Quarters, see Attachment 4.) Staff calculated a set of group quarters rates by dividing the group quarters population in each age, sex, race and ethnic category as provided by the 2010 Census⁷ by the total 2010 age, sex, race and ethnic population in each county. The team then updated these 2010 rates to reflect 2020 population and group quarters population estimates from the Department of Finance. In order to estimate the group quarters population in each county, staff multiplied the group quarters rates within each category by the total population in each category. This population was then removed from the total population to provide an estimate of the number of people living in households, by demographic subgroup.

Next, to generate estimates of the total number of households in each county, staff calculated a set of head of householder rates. These also are frequently referred to as “headship rates” or “household formation rates.” As with the group quarters rates, these are derived from 2010 Census data.⁸ To generate the head of householder rates, staff divided the 2010 estimates of the number of individuals within each age, race and ethnic category who were reported to be the head of a household by the total number of individuals within each age, race, and ethnic population category less the group quarters population.⁹ By multiplying the base-year household population estimates for each category by the head of householder rates, staff derived a new set of head of household estimates, which were controlled to published data from the California Department of Finance. Note that for each head of household there is, by definition, one household. Thus, by adding up all of the head of householders, the staff was able to generate estimates of the total number of households within each county.¹⁰

Finally, vacant units were added to the total number of households in order to obtain an estimate of housing units. Vacancy data was obtained from the U.S. Census Bureau for 1990, 2000 and 2010, and

⁷ U.S. Census Bureau, 2010 Decennial Census, Summary File 1, Table QTP-12.

⁸ U.S. Census Bureau, 2010 Decennial Census, Summary File 2, Table PCT-12.

⁹ The householders data for the "Some other race alone, not Hispanic or Latino" and "Native Hawaiian and Other Pacific Islander alone, not Hispanic or Latino" categories of population in San Benito County was suppressed because there was not a population of greater than 100. For these ethnic categories the regional rate was used instead given the lack of data on this population.

¹⁰ The Census does include "second dwelling units" or accessory units within their counts of households if the unit has its own bathroom and kitchen facilities. However, there are likely illegal "granny units" that are not counted through this process.

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from the Department of Finance for intercensal years.¹¹ To better understand what a normal housing vacancy rate might be, staff reviewed historical data on residential vacancy for the last two decades. Once a vacancy rate was established, this was used to calculate the total number of vacant housing units (the number of occupied units being equal to the number of households). By adding together estimates of the total number of vacant and occupied housing units, staff derived estimates of the total housing stock within each county.

Forecasting Sub-County Population, Households and Housing Units

To derive a city-level forecast of population, household population, households, and housing units, staff used a simplified version of the methodology described above. The MPO is not required to develop detailed demographic characteristics for city-level estimates. As such the household and housing unit conversion was done using aggregate group quarters and household formation rates for each city, as reported in the 2010 Census and with trends through 2020 from the Department of Finance.¹² Vacancy rates were derived from a 30-year average as reported by the Department of Finance.¹³ The Department of Finance does benchmark their estimates to the decennial Census.

Some of the jurisdictions within the region show a declining population over the last 10 to 20 years. Because the Implicit Shift-Share method was used for projecting 2025 population and the method reflects the change in population over time, for those jurisdictions that have experienced population decline there would be a continuation of that decline reflected for the year 2025. Instead of showing a decline, the 2025 share of the regional population calculated for these jurisdictions was held constant. This has the effect of showing an increase in population to 2025 even if recent trends were toward population decline. There is too little information to know whether short-term declines will continue, so instead of assuming continual decline, growth was held at a constant. AMBAG will continue to monitor these trends.

¹¹ Department of Finance, E-8 Historical Population and Housing Estimates for Cities, Counties and the State, 1990-2000, August 2008; and Department of Finance, E-5 Population and Housing Estimates for Places, 2001-2010, with 2000 Benchmark, September 2011.

¹² U.S. Census Bureau, 2010 Decennial Census, Summary File 1, Tables QTP-12 and PCT-12.

¹³ Department of Finance, E-8 Historical Population and Housing Estimates for Cities, Counties and the State, 1990-2000, August 2008; Department of Finance, E-4 Population Estimates for Cities, Counties and the State, 2001-2010, September 2011 and Department of Finance, E-5 Population Estimates for Cities, Counties and the State, 2010-2016, July 2016.

Section 4: Demographic History of the AMBAG Region

The AMBAG region grew at a faster rate than California in the 1960s and 1970s and grew at approximately the same rate as the state in the 1980s (24% in AMBAG region, 26% statewide). Both the state and the AMBAG region grew at the same rate in the 1990s (14%). The AMBAG region's growth fell far below the statewide average between 2000 and 2010, increasing by only three percent while the state grew by 10 percent. From 2010 to 2020 both the state and the AMBAG region grew at similar rates (7% and 6%, respectively).

AMBAG Region: 1970 to 1990

Between 1970 and 1990 the AMBAG region population grew by more than 110,000 each decade, increasing by 29 percent from 1970 to 1980 and by 24 percent from 1980 to 1990. Growth slowed in the 1990s. The slowdown can be attributed, in part, to the closure of Fort Ord in 1994, which is described in more detail in the "Adjustments" section, below. These population losses greatly affected the growth rates of the communities of Marina and Seaside prior to 2000. Concurrent civilian job losses affected population growth in the AMBAG region more broadly. The AMBAG region population grew by 88,500 (14%) between 1990 and 2000.

AMBAG Region: 2000 to 2010

In the following decade, population growth slowed considerably. The AMBAG region population grew by only 22,100 (3%) during the decade between 2000 and 2010. This pattern of slowing population growth reflects an aging population and lower net migration into the AMBAG region. Lowered net migration could be due to several factors including but not limited to water resource constraints, the after-effects of the closure of Fort Ord, as well as increasing housing costs followed by a major recession.

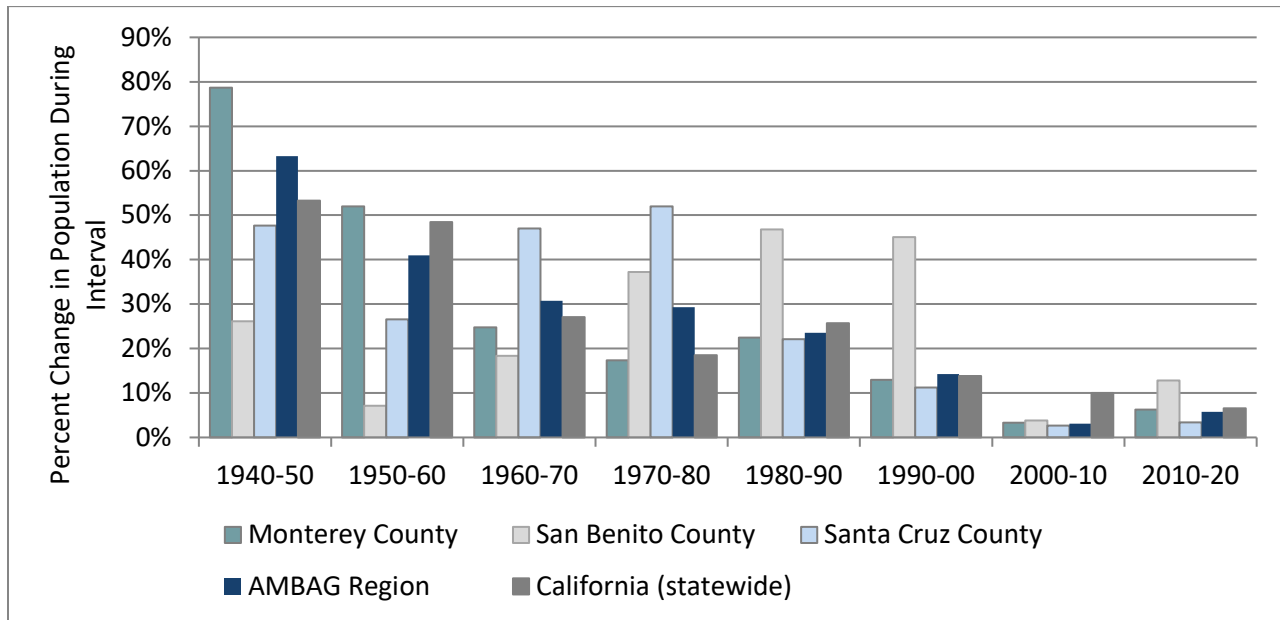
AMBAG Region: 2010 to 2020

In the five years since the decennial census, population growth began to return to historical levels. The AMBAG region population grew by just over 42,000 (6%) during the period between 2010 and 2020. This recovery in population growth reflects post-recession recovery.

Demographic History of AMBAG Counties

Population growth details for all three counties are shown below. County-specific summaries follow the charts.

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Figure 16: Population Growth Rates in Monterey County, San Benito County, Santa Cruz County, AMBAG Region and California (statewide) 1940-2020

Source: California Department of Finance

Monterey County

Between 1960 and 2000, Monterey County has grown at a rate slower than the AMBAG region as a whole. From 2000-2010 and 2010-2020 Monterey County grew at the same rate in the region. (See Figure 16, above.)

As a result of the closure of Fort Ord, Monterey County experienced a population decline in the middle of the 1990s, yet population growth rebounded later in the decade. The county registered 13 percent growth (an increase of 46,100) between 1990 and 2000. (See Figures 2 and 3)

The 1990s also saw the opening of two large institutions: California State University, Monterey Bay and Salinas Valley State Prison. Both are described in more detail in the Special Populations section below.

While the County as a whole grew, six of the county's thirteen jurisdictions experienced population loss during the 1990s (Carmel-By-The-Sea, -4%; Del Rey Oaks, -1%, Marina, -29%, Monterey, -7%, Pacific Grove, -4%, Seaside, -15%). Conversely, the population of Salinas grew by nearly 34,000 during the decade. Soledad also grew at a rapid clip (16,000 population) largely as the result of Salinas Valley State Prison opening in 1996.

The following decade saw much slower growth, with an increase of less than 13,300 (3%) between 2000 and 2010. Five jurisdictions lost population (Carmel-By-The-Sea, -9%; Del Rey Oaks, -2%,

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Monterey, -6%, Pacific Grove, -3%, unincorporated Monterey County, -1%). The city of Seaside remained virtually unchanged.

From 2010 to 2020, the cities of Greenfield, King City, Marina, and Sand City all had estimated growth of greater than 10 percent. Only the city of Soledad is estimated to have lost population.

San Benito County

While San Benito County grew at a rate much slower than the AMBAG region prior to the 1970s, the county saw rapid population growth in the 1970s, 1980s, and 1990s, a dip in the early 2000s, and a return to rapid growth 2010-2020. (See Figure 16, above.)

San Benito County registered rapid population growth, adding more than 16,500 population (45%) between 1990 and 2000. During this decade the city of Hollister nearly doubled in population (78%) while the population of San Juan Bautista declined (-1%).

San Benito's population growth slowed to four percent (2,000 population) between 2000 and 2010. The trend of the 1990s was reversed. Hollister grew by only one percent while San Juan Bautista increased by 20 percent.

From 2010 to 2020 San Benito County grew faster than the region, with Hollister and San Juan Bautista growing by 16% and 13%, respectively.

Santa Cruz County

Santa Cruz County grew at a rate faster than the AMBAG region in the 1960s and 1970s, but grew more slowly in every other decade from 1940-2020. (See Figure 16, above.)

Santa Cruz County grew by more than 25,800 (11%) between 1990 and 2000. The fastest-growing jurisdiction in Santa Cruz County between 1990 and 2000 was Watsonville (42%) followed by Scotts Valley (31%). Capitola's population fell during the decade (-1%).

The County's growth slowed considerably, adding just under 6,800 population (3%) between 2000 and 2010. The fastest-growing jurisdiction in Santa Cruz County between 2000 and 2010 was Watsonville (16%, including the annexation area, 11% without) followed by Santa Cruz (10%). Scotts Valley, which grew rapidly during the 1990s, showed only two percent population growth during the decade. Capitola's population fell during the decade (-1%).

In recent years, no jurisdiction in Santa Cruz has grown by more than 10 percent. The fastest growing city, Santa Cruz, grew by 7% between 2010 and 2020.

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Adjustments for Special Populations

In small area demographic analysis, some populations grow or decline as a result of exogenous factors, rather than in response to demographic or economic conditions. For example, uniformed military populations, college populations, and prison populations may grow or decline as new facilities are added or older facilities are phased out of use. These population changes involve facilities that are outside the authority of local land use agencies and that change based on policy, rather than demographic, factors.

Changes in these facilities can result in population “shocks” that affect the rate of population change within an area, independent of larger demographic and economic trends.

As a result of their unique characteristics, these populations are referred to as “special populations” and are often treated separately in forecasting.

Special populations include people associated with military bases, tourists, prisons, and colleges and universities. The size of a special population may have no connection to the general trends affecting the area. A special population can be stable for long periods of time, balloon quickly, and deflate, or, in the case of military bases, disappear rapidly through a closure program. It is best to develop a detailed understanding of the nature of the special population and set out the projection for it separately.¹⁴

Over the past two decades, the AMBAG region has been home to several “special populations” including the military resident population at Fort Ord, the Defense Language Institute and Naval Postgraduate School, students at UCSC and CSUMB, and inmates at SVSP.

In the preliminary forecast, AMBAG staff began the shift-share analysis at 1996 to address the population “shocks” resulting from the closure of Fort Ord and the opening of both California State University Monterey Bay and the Salinas Valley State Prison. While this adjustment was effective at addressing some of the special population concerns, it has a key weakness: it does not allow for independent forecasting of special populations.

The following discussion provides a method for addressing that issue.

¹⁴ Merc, Stuart. “Projections and Demand Analysis.” Planning and Urban Design Standards. published by the American Planning Association. Sept 2012.
<http://books.google.com/books?id=NXpncFYj73QC&pg=PA299&lpg=PA299&dq=%22special+population%22+forecasting&source=bl&ots=L2fSbUMT8R&sig=uV05NN3-rNYcpCr97xU2hTpYt6s&hl=en&sa=X&ei=eEC5UMT8O42tqAGAvIDQCQ&ved=0CG0Q6AEwCQ#v=onepage&q=%22special%20population%22%20forecasting&f=false>

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History of Special Populations in the AMBAG Region***Fort Ord***

Established in 1917, Fort Ord was eliminated during the Base Realignment and Closure Act of 1990, closing in 1994. This resulted in the loss of more than 30,000 residents in Monterey County, primarily in the jurisdictions of Marina and Seaside, as described in the Fort Ord Reuse Plan:

*Fort Ord has been a significant presence in Monterey County since 1917... maintained a large military population numbering approximately 14,500 military personnel and 17,000 family members of active-duty personnel... the resident population of Fort Ord totaled 31,270 in 1991.*¹⁵

In addition...

*The on-post resident population was divided between the two municipalities of Marina and Seaside. Through 1990, 17,139 people (56%) were within the Seaside city limits and 13,321 people (44%) were within the Marina city limits (Harding Lawson Associates, 1991, Workplan remedial investigation/feasibility study, Fort Ord, CA).*¹⁶

These population losses greatly affected the communities of Marina and Seaside. However, the forecast was developed using the 2000 to 2015 time period as a historical reference. By 2000 abnormalities in growth rates caused by the closure of Fort Ord had self-corrected. The Fort Ord Reuse Authority's mandate for overseeing the area ended in June 2020. Beginning with the 2022 RGF, the area will be projected as any other potential development in the AMBAG region, based on plans and permits.

Defense Language Institute and Naval Postgraduate School

The Army Language School, later renamed the Defense Language Institute, has been a presence in Monterey County since the end of World War II. The number of people living in group quarters at the Institute and Postgraduate School has been stable, at approximately 4,000, in recent years. Because of this stability, the 2018 RGF presumes no change to the population of these two institutions in future years.

¹⁵ Fort Ord Reuse Plan, Volume 1: Context and Framework. June 1997.

¹⁶ Fort Ord Reuse Plan, Volume 2: Reuse Plan Elements. June 1997.

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University of California, Santa Cruz

Founded in 1965, the University of California, Santa Cruz grew to 9,800 students by the 1991-92 academic year, 10,885 students by the 1999-2000 academic year, and 16,300 full-time equivalent students in the 2009-2010 academic year.¹⁷ In meetings with AMBAG staff, UCSC staff indicated that they expect growth of 300-500 students per year, resulting in a 2040 student forecast of 28,000 (the 2022 RGF holds this level constant from 2040-2045).

It is important to note that these projections reflect full-time equivalent students, and actual headcounts will likely be higher.

California State University, Monterey Bay

Founded in 1995, California State University Monterey, Bay grew to 2,265 students during the 1999-2000 school year and 4,000 students by 2010.¹⁸ Although not created by the Fort Ord Reuse Plan, the University is a significant component of the Base Reuse Plan and as it continues to grow will help to stimulate the economic development of the Fort Ord Area. The most recent master plan projects full-time equivalent student enrollment of 12,000 by 2025.¹⁹ In meetings with AMBAG staff, CSUMB staff indicated that they expect growth to 12,700 full-time equivalent students by 2045.

It is important to note that these projections reflect full-time equivalent students, and actual headcounts will likely be higher.

In addition, discussions with CSUMB staff suggested that some group quarters (student) dormitory housing in the “East Campus” unincorporated area would convert to faculty/family housing over time. This transition is reflected through the growth of group quarters population in the Marina area of the CSUMB campus, decline of group quarters in Unincorporated Monterey County—and transition of those formerly group quarters structures into family housing (i.e. increase in households and housing units).

¹⁷ University of California, Santa Cruz Department of Planning and Budget.

<http://planning.ucsc.edu/irps/thirdWeek.asp> accessed December 2012. Figures based on 3-quarter average measured in the spring quarter of the academic year.

¹⁸ California State University Monterey Bay historical timeline <http://about.csumb.edu/node/4287> accessed November 2012.

¹⁹ Recirculated Draft Environmental Impact Report for the California State University Monterey Bay 2007 Master Plan. July 2008.

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Salinas Valley State Prison and Soledad Correctional Training Facility

Opened in 1996, Salinas Valley State Prison has a design capacity of 3,888.²⁰ According to annual reporting by the California Department of Finance, the facility had a resident population of 4,100 at the beginning of the 2000s decade and a population of 3,630 on January 1, 2010.²¹ The facility has a maximum capacity of 4,400, according to the 2010 Master Plan Annual Report.²²

Opened in 1946, Soledad Correctional Training Facility has a design capacity of 3,301. According to annual reporting by the California Department of Corrections and Rehabilitation and counts from the 2000 and 2010 decennial census, the facility had a resident population of between 6,000 and 7,200 during the decade.²³

Because both facilities currently house group quarters populations in excess of their design capacity, no future population growth is shown at these facilities in the 2018 RGF. Population totals are held constant at their 2015 levels.

Table 10: Historical Special Population Counts

| | 1990 | 2000 | 2010 | 2015 |
|--|---------|--------|--------|--------|
| Fort Ord Military Population | 31,270* | 0 | 0 | 0 |
| Defense Language Institute and Naval Postgraduate School | n/a | n/a | 4,227 | 4,004 |
| University of California, Santa Cruz | 9,800** | 10,885 | 16,332 | 17,276 |
| California State University, Monterey Bay | 0 | 2,265 | 4,000 | 6,368 |
| Salinas Valley State Prison | 0 | 4,100 | 3,630 | 3,592 |
| Soledad Correctional Training Facility | 0 | 7,120 | 6,148 | 4,707 |

* *Estimate.*

**1990 figure for University of California, Santa Cruz reflects data from the 1991-92 academic year, the earliest year reported.

²⁰ California Department of Corrections and Rehabilitation website for Salinas Valley State Prison. Figure reported for fiscal year 2009-2010. http://www.cdcr.ca.gov/Facilities_Locator/SVSP-Institution_Stats.html accessed December 9, 2012.

²¹ California Department of Finance. Exclusion and Dorm Report. November 2012.

²² Master Plan Annual Report: Calendar Year 2010. California Department of Corrections and Rehabilitation. January 2011.

²³ California Department of Corrections and Rehabilitation website for Soledad Correctional Training Facility. Figure reported for fiscal year 2007 http://www.cdcr.ca.gov/Facilities_Locator/CTF-Institution_Stats.html accessed December 9, 2012. Population counts derived from institutionalized group quarters counts from Census 2000 and Census 2010, U.S. Census Bureau.

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Adjustments to the Population Projections***Developing Special and Non-Special Population Estimates***

Special populations provide a challenge to the population projections because their growth and decline are often not determined by factors that impact the rates of change of the general population. This is particularly true of college students, prison inmates, and military personnel and their dependents. Residents of nursing homes, while also a special population, share many of the characteristics of the general population, and their growth and decline often mirror the demographic changes of the larger community. To deal with the special population issue, a common procedure applied in population projections is to exclude the special populations by using group quarters data and to project the adjusted population separately, i.e., the total population minus the special population. At the end of the projection module, the special population is added back to the projected adjusted population to produce the projected total population. The special population is either held constant or projected separately.²⁴

Thus, projections for AMBAG jurisdictions (Marina, Santa Cruz, Seaside, Soledad and unincorporated Monterey County) should be adjusted to account for special populations independent of the non-special population trends.

To accomplish this, special populations should be subtracted from the census year population estimates used in developing the shift-share model population shares. Independent projections of the special populations (e.g., from master plan documents) should then be addressed separately in the population forecast.

Incorporating Special Populations into the Final Projections

As noted above, Fort Ord has closed, and thus major military populations can be assumed to be constant throughout the remainder of the forecast.

For the universities and the prison, master plan documents provide useful information about expected future populations. These population plans can be used to fill in horizon-year projections, which are then kept constant for any remaining years of the AMBAG forecast. Additionally, staff worked closely with UCSC to develop conservative estimates for growth after the horizon year of their long-range development plan.

²⁴ Rayer, Stephan. MISER Population Projections for Massachusetts, 2000–2020. July 2003.

<http://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=4&cad=rja&ved=0CEUQFjAD&url=http%3A%2F%2Fwww.umass.edu%2Fmiser%2Fpopulation%2FDocuments%2FMAPProjMethodology.doc&ei=-ke5UNPKDMmdggH0h4GgDQ&usg=AFQjCNF6tP0wQ9CqtSb8X7-UtMm9rmMrw&sig2=8pz3atGy03rNWjtvjbdjeg>

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Translating Population Growth into Housing

Special population adjustments for Fort Ord require no special processing, as the military population on Fort Ord is not expected to change in future years.

However, university populations for UCSC and CSUMB pose a special case. While housing will be provided by the universities, it is likely that many students will live in group quarters (described in more detail in Attachment 4), but at least some students will reside in housing “in town” as part of the resident population of surrounding jurisdictions. For this reason, university population projections and housing projections were completed separately from the jurisdiction population projections.

Population projection adjustments for SVSP and SCTF require no special processing for housing unit projections. These populations will be classified as group quarters, and thus are not considered in housing calculations.

Adjustments for Annexations

The shift-share approach outlined above presumes that most population change is a result of demographic and economic forces that can be represented by the rate of change over time. The shift-share approach is intended for use with jurisdictions that retain consistent geographic boundaries over time. Because the shift-share method presumes constant geographic boundaries, annexations, which by definition change jurisdiction boundaries, pose a unique problem. Adjustment techniques are needed to address these cases. Between 1990 and 2010 there was one heavily populated annexation in the AMBAG region. This case, the Watsonville annexation, is described in more detail below. (In 2008 Salinas also annexed the North of Boronda Future Growth Area, which had a population of approximately 100. This annexation, which affected the overall jurisdiction population by less than 0.1%, was not modeled separately.)

History of Annexations in the AMBAG Region

In 2000 the city of Watsonville annexed a portion of unincorporated Santa Cruz County. Known as the Freedom-Carey annexation, the change was recorded in July 2000, after the 2000 decennial Census.

Historical population estimates for the City of Watsonville, unincorporated Santa Cruz County and Freedom-Carey annexation area are shown in Table 11 below.

The data for 2000 reflect reports published by the Local Agency Formation Commission with respect to the annexation area. Data for 1990 were derived using trend extrapolations based on the rate of growth in associated census tracts (1106 and 1107). Similarly, data for 2010 were derived using trend extrapolations based on the rate of growth in associated census tracts (1105.02, 1106 and 1107).

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If the annexation of 2,022 residents were simply attributed to the population growth of Watsonville between 2000 and 2010, it would account for forty percent of the growth in the city's population during that period of time. Conversely, the loss of the annexed population would account for more than half of the decline in unincorporated population between 2000 and 2010.

Since the shift reflects an administrative boundary change, not a demographic one, the shift-share model was adjusted accordingly.

Table 11: Historical Population Estimates for the Watsonville Annexation Area

| | 1990 | 2000 | 2010 |
|-------------------------------------|---------|---------|---------|
| City of Watsonville | 31,099 | 44,246 | 51,199 |
| Excluding Annexation Area | 31,099 | 44,246 | 49,229 |
| Unincorporated County of Santa Cruz | 130,086 | 135,345 | 129,739 |
| Excluding Annexation Area | 128,426 | 133,323 | 129,739 |
| Annexation Area | 1,660 | 2,022 | 1,970 |

Sources: Analysis by PRB of data from the U.S. Census Bureau.

Adjusting the Watsonville and Unincorporated Santa Cruz County Projections

In order to ensure that the population shift resulting from annexation does not skew the shift-share results for Watsonville or unincorporated Santa Cruz County, population projections for Watsonville, unincorporated Santa Cruz County, and the annexation area were estimated separately.

To complete this adjustment, the estimated annexation area population was subtracted from the unincorporated Santa Cruz County population totals in 1990 and 2000. Similarly, the projected population from the annexation area population was added to Watsonville in 2010.

Independent shift-share projections were developed for each of the three sub-areas: Watsonville excluding the annexation area, unincorporated Santa Cruz County excluding the annexation area and the annexation area.

To complete the projections, the annexation area projected population growth was added to Watsonville. Unlike the special population projections described above, there are no further adjustments needed to translate the resulting population projections into housing projections.

Attachment 1: List of Meetings & Attendees

| Agency | Meeting Date | Meeting Time | Location | AMBAG Attendees* | Other Attendees* |
|----------------------|--------------|--------------|---|---|--|
| City of Gonzales | 9/3/2019 | 1:30 PM | 147 Fourth Street, Gonzales, CA | Maura Twomey, Heather Adamson and Paul Hierling | Matthew Sundt |
| City of Hollister | 9/10/2019 | 1:30 PM | 375 Fifth Street, Hollister, CA | Maura Twomey, Heather Adamson and Paul Hierling | Abraham Prado and Jamila Saqqa |
| City of Marina | 8/21/2019 | 11:00 AM | 209 Cypress Avenue, Marina, CA | Maura Twomey, Heather Adamson and Paul Hierling | Fred Aegerter, Christy Hopper and Matt Mogensen |
| City of Salinas | 8/28/2019 | 1:30 PM | 65 West Alisal Street, 2nd Floor, Salinas, CA | Maura Twomey, Heather Adamson and Paul Hierling | Megan Hunter and Adam Garrett |
| City of Santa Cruz | 8/23/2019 | 1:00 PM | 809 Center Street, Room 107, Santa Cruz, CA | Maura Twomey, Heather Adamson and Paul Hierling | Lee Butler |
| City of Seaside | 9/10/2019 | 11:00 AM | 656 Broadway Avenue, Seaside, CA 93955 | Heather Adamson and Paul Hierling | Rick Medina |
| County of Monterey | 8/7/2019 | 4:00 PM | 1441 Schilling Pl, 2nd Floor, Salinas, CA | Maura Twomey, Heather Adamson and Paul Hierling | Brandon Swanson and John Dugan |
| County of Monterey | 8/12/2019 | 3:15 PM | 168 West Alisal, 3rd Floor, Salinas, CA | Paul Hierling | Darby Marshall and Anastacia Wyatt |
| County of San Benito | 9/4/2019 | 1:00 PM | 2301 Technology Parkway, Hollister, CA | Maura Twomey, Heather Adamson and Paul Hierling | Harry Mavrogenes, Taven Kinison Brown and Jamila Saqqa |
| County of Santa Cruz | 8/23/2019 | 3:00 PM | 701 Ocean Street, Room 400, Santa Cruz, CA | Maura Twomey, Heather Adamson and Paul Hierling | Kathy Molloy and Stephanie Hansen |

*All attendees were at the meeting in person unless otherwise noted.

| Agency | Meeting Date | Time | Location | AMBAG Attendees* | Jurisdiction Attendees* |
|---------------------------|--------------|----------|--|---|---|
| City of Capitola | 2/3/2020 | 9:30 AM | 420 Capitola Ave., Capitola, CA | Heather Adamson | Katie Herlihy |
| City of Carmel-By-The-Sea | 2/5/2020 | 9:30 AM | AMBAG Office | Maura Twomey, Gina Schmidt, Miranda Taylor | Marnie Waffle |
| City of Del Rey Oaks | 2/13/2020 | 11:00 AM | 650 Canyon Del Rey Blvd, Del Rey Oaks, CA | Heather Adamson and Miranda Taylor | Dino Pick and Denise Duffy |
| City of Gonzales | 2/7/2020 | 2:00 PM | City of Gonzales, 147 Fourth Street, Gonzales, CA | Heather Adamson | Matthew Sundt |
| City of Greenfield | 3/3/2020 | 9:00 AM | Greenfield City Hall, 599 El Camino Real, Greenfield, CA | Heather Adamson, Maura Twomey and Miranda Taylor | Paul Mugan |
| City of Hollister | 3/10/2020 | 2:00 PM | City of Hollister, Development Services, 375 Fifth Street, Hollister, CA 95023 | Heather Adamson | Abraham Prado, Jamila Saqqa, Eva Kelly and Ambur Cameron |
| City of King City | 3/10/2020 | 11:00 AM | City of King City Hall, 212 South Vanderhurst Avenue, King City, CA 93930 | Heather Adamson, Maura Twomey and Miranda Taylor | Doreen Liberto-Blanck and Maricruz Aguilar-Navarro |
| City of Marina | 2/26/2020 | 2:30 PM | City of Marina, Community Depevelopment Dept, 209 Cypress Avenue, Marina, CA | Heather Adamson, Maura Twomey and Miranda Taylor | Christy Hopper and Lisa Berkley |
| City of Monterey | 2/4/2020 | 1:00 PM | City of Monterey, 580 Pacific Street, Monterey, CA 93940 | Heather Adamson, Maura Twomey, Miranda Taylor | Kim Cole |
| City of Pacific Grove | 2/5/2020 | 11:30 AM | City of Pacific Grove, 300 Forest Avenue, 2nd Floor, Pacific Grove, CA 93950 | Maura Twomey, Gina Schmidt, Miranda Taylor | Anastazia Aziz and Alyson Hunter |
| City of Salinas | 3/2/2020 | 10:00 AM | City of Salinas, 65 West Alisal Street, 2nd Floor, Salinas, CA | Heather Adamson and Miranda Taylor | Megan Hunter and Tara Hullingers |
| City of San Juan Bautista | 2/24/2020 | 9:00 AM | San Juan Bautista City Hall, 311 2nd Street, San Juan Bautista, CA | Heather Adamson | Don Reynolds and Mary Gilbert (SBtCOG) |
| City of Sand City | 2/11/2020 | 3:00 PM | Sand City, City Hall, 1 Pendergrass Way, Sand City, CA | Heather Adamson, Maura Twomey, Miranda Taylor | Chuck Pooler and Aaron Blair |
| City of Santa Cruz | 3/9/2020 | 11:00 AM | City of Santa Cruz, 809 Center Street, Room 107, Santa Cruz, CA | Heather Adamson | Lee Butler, Katherine Donovan and Eric Marlatt |
| City of Scotts Valley | 2/3/2020 | 11:30 AM | 1 Civic Center Drive, Scotts Valley, CA | Heather Adamson | Taylor Bateman |
| City of Seaside | 3/3/2020 | 2:00 PM | 656 Broadway Avenue, Seaside, CA 93955 | Heather Adamson, Maura Twomey, Paul Hierling and Miranda Taylor | Kurt Overmeyer, Gloria Stearns and Sharon Mikesell |
| City of Soledad | 2/24/2020 | 1:30 PM | City of Soledad, City Hall, 248 Main Street, Soledad, CA | Heather Adamson and Miranda Taylor | Brent Slama |
| City of Watsonville | 2/21/2020 | 10:00 AM | Community Development Dept., 250 Main Street, Watsonville, CA 95076 | Heather Adamson | Suzi Merriam and Justin Meek |
| | 2/21/2020 | 10:00 AM | Community Development Dept., 250 Main Street, Watsonville, CA 95076 | Heather Adamson | Suzi Merriam and Justin Meek |
| County of Monterey | 3/17/2020 | 2:30 PM | GoTo Meeting | Heather Adamson and Paul Hierling | Brandon Swanson |
| County of San Benito | 3/4/2020 | 3:00 PM | San Benito County - RMA, 2301 Technology Parkway, Hollister, CA | Heather Adamson and Maura Twomey | Harry Mavrogenes and Taven Kinison Brown |
| County of Santa Cruz | 3/9/2020 | 3:00 PM | County of Santa Cruz, 701 Ocean Street, Room 400, Santa Cruz, CA | Heather Adamson | Kathy Molloy, Paia Levine, Barbara Mason, Stephanie Hansen and Anais Schenk |
| CSU Monterey Bay | 2/5/2020 | 3:00 PM | 2061 Intergarrison Road, Suite 84-A, Seaside, CA | Maura Twomey, Gina Schmidt, Miranda Taylor | Anya Spear and Matt McCluney |
| Monterey County LAFCO | 2/11/2020 | 1:00 PM | LAFCO Monterey Co., 132 W. Gabilan Street, Suite 102, Salinas, CA 93901 | Heather Adamson, Maura Twomey, Miranda Taylor | Kate McKenna |
| Santa Cruz County LAFCO | 2/21/2020 | 1:00 PM | LAFCO, 701 Ocean Street, Room 318-D, Santa Cruz, CA 95060 | Heather Adamson | Joe Serrano |
| UC Santa Cruz | 2/25/2020 | 10:30 AM | UC Santa Cruz, 1156 High St, Barn G, Santa Cruz, CA 95064 | Heather Adamson | Jolie Kerns and Oxo Slayer |

*All attendees were at the meeting in person unless otherwise noted

| Agency | Meeting Date | Meeting Time | Location | AMBAG Attendees | Jurisdiction Attendees |
|---------------------------|--------------|--------------|--------------|--|--|
| City of Capitola | 5/19/2020 | 1:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Katie Herlihy |
| City of Carmel-By-The-Sea | 5/26/2020 | 1:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Marnie Waffle |
| City of Del Rey Oaks | 6/17/2020 | 4:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Dino Pick and Denise Duffy |
| City of Gonzales | 5/26/2020 | 3:00 PM | GoTo Meeting | Heather Adamson, Paul Hierling, and Miranda Taylor | Matthew Sundt |
| City of Greenfield | 6/11/2020 | 11:00 AM | GoTo Meeting | Maura Twomey, Heather Adamson, and Miranda Taylor | Paul Mugan |
| City of Hollister | 5/29/2020 | 10:00 AM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Abraham Prado, Jamila Saqqa, Eva Kelly and Ambur Cameron from Hollister; Mary Gilbert from SBtCOG. Additionally, various consultants for the Hollister General Plan attended this meeting. |
| City of King City | 6/2/2020 | 1:00 PM | GoTo Meeting | Heather Adamson and Miranda Taylor | Doreen Liberto-Blanck and Maricruz Aguilar-Navarro |
| City of Marina | 5/28/2020 | 10:00 AM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Christy Hopper and Fred Aegerter |
| City of Monterey | 5/29/2020 | 1:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Kimberly Cole |
| City of Pacific Grove | 5/19/2020 | 3:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Anastazia Aziz, Alyson Hunter and Terri Schaeffer |
| City of Salinas | 6/8/2020 | 2:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Megan Hunter, Tara Hullinger, and Jonathan Moore |
| City of San Juan Bautista | 6/1/2020 | 1:30 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Don Reynolds and Mary Gilbert from SBtCOG |
| City of Sand City | 6/17/2020 | 9:00 AM | GoTo Meeting | Heather Adamson, Paul Hierling, and Miranda Taylor | Chuck Pooler and Aaron Blair |
| City of Santa Cruz | 5/18/2020 | 9:00 AM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Lee Butler, Katherine Donovan, Bonnie Lipscomb, Eric Marlatt and Matt Vanhua |
| City of Scotts Valley | 6/3/2020 | 1:00 PM | GoTo Meeting | Maura Twomey, HPaul Hierling, and Miranda Taylor | Taylor Bateman |
| City of Seaside | 6/11/2020 | 4:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Kurt Overmeyer and Gloria Stearns |

| Agency | Meeting Date | Meeting Time | Location | AMBAG Attendees | Jurisdiction Attendees |
|----------------------|--------------|--------------|--------------|--|--|
| City of Soledad | 6/16/2020 | 1:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Brent Slama |
| City of Watsonville | 6/2/2020 | 3:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Suzi Merriam and Justin Meek |
| County of Monterey | 6/3/2020 | 9:00 AM | GoTo Meeting | Maura Twomey, Paul Hierling, and Miranda Taylor | Brandon Swanson, John Dugan and Anastacia Wyatt |
| County of Monterey | 6/29/2020 | 1:00 PM | GoTo Meeting | Maura Twomey, Paul Hierling, Miranda Taylor and Beth Jarosz (consultant) | Brandon Swanson, John Dugan, Craig Spencer and Anastacia Wyatt |
| County of San Benito | 6/1/2020 | 9:00 AM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Harry Mavrogenes, Taven Kinison Brown and Mary Gilbert from SBtCOG |
| County of Santa Cruz | 5/18/2020 | 3:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, and Miranda Taylor | Paia Levine, Barbara Mason, Anais Schenk, Kathy Molloy, Stephanie Hansen |
| CSU Monterey Bay | 6/16/2020 | 3:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, | Anya Spear, Matt McCluney, and Kathleen Ventimiglia |
| CSU Monterey Bay | 7/10/2020 | 1:00 PM | GoTo Meeting | Heather Adamson and Beth Jarosz (consultant) | Matt McCluney and Kathleen Ventimiglia |
| UC Santa Cruz | 6/15/2020 | 3:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson, Paul Hierling, | Oxo Slayer |

| Agency | Meeting Date | Meeting Time | Location | AMBAG Attendees | Jurisdiction Attendees |
|-----------------------|--------------|--------------|--------------|--|---|
| City of Del Rey Oaks | 8/25/2020 | 1:00 PM | GoTo Meeting | Heather Adamson | Dino Pick and Denise Duffy (consultant) |
| City of Greenfield | 9/4/2020 | 2:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | Rob Mullane (consultant) and Paul Mugan |
| City of Hollister | 8/20/2020 | 11:00 AM | GoTo Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | Abraham Prado, Jamila Saqqa, Bryan Swanson, Eva Kelly, Ambur Cameron, Areli Perez and Marian Mendez from Hollister; Mary Gilbert from SBtCOG |
| City of Hollister | 9/4/2020 | 3:30 PM | GoTo Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | Carol Lenoir |
| City of King City | 8/24/2020 | 11:00 AM | GoTo Meeting | Maura Twomey and Heather Adamson | Doreen Liberto-Blanck and Maricruz Aguilar-Navarro |
| City of Marina | 8/7/2020 | 3:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | Christy Hopper, Fred Aegerter, Layne Long and Lisa Berkeley |
| City of Monterey | | | GoTo Meeting | | |
| City of Pacific Grove | 8/7/2020 | 1:30 PM | GoTo Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | Anastazia Aziz and Terri Schaeffer |
| City of Salinas | 9/8/2020 | 2:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | Megan Hunter and Jonathan Moore |
| County of Monterey | 8/13/2020 | 3:30 PM | GoTo Meeting | Heather Adamson and Beth Jarosz (consultant) | Brandon Swanson and John Dugan |
| County of San Benito | 8/10/2020 | 1:00 PM | GoTo Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | Harry Mavrogenes, Taven Kinison Brown, Jamila Saqqa, Gary Black (Hexagon), Ollie Zhou (Hexagon), Stan Ketchum (contract planner) and Mary Gilbert from SBtCOG |

| Agency | Meeting Date | Meeting Time | Location | AMBAG Attendees | Jurisdiction Attendees |
|---------------------------|--------------|--------------|---------------|--|--|
| City of San Juan Bautista | 10/30/2020 | 9:00 AM | Go To Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | John Freeman, Don Reynolds, and Mary Gilbert from SBtCOG |
| County of San Benito | 10/29/2020 | 3:00 PM | Go To Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | Anthony Botelho, Mark Medina, Taven Kinison Brown, Benny Young, Stan Stan Ketchums, and Mary Gilbert from SBtCOG |
| County of San Benito | 11/2/2020 | 2:00 PM | Go To Meeting | Maura Twomey, Heather Adamson and Beth Jarosz (consultant) | Benny Young, Taven Kinison Brown, and Mary Gilbert from SBtCOG |

Attachment 2: Employment Classification Explanations & Examples

AMBAG relies upon data from the California Employment Development Department and other statistical agencies (e.g. U.S. Bureau of Labor Statistics) for information about employment in the AMBAG region. Information is reported using the North American Industry Classification System (NAICS). NAICS is a production-orientated conceptual framework that groups establishments into industries based on their primary business activity. Establishments using similar material inputs, capital, and labor are classified in the same industry. In California, NAICS codes are assigned by the Labor Market Information Division (LMID) at the California Employment Development Department and can be changed at the request of the employer.²⁵

Companies within NAICS industrial categories may have similar material inputs and labor demands, but they may have very different trip generation rates—which are important for transportation modeling and planning. For some industries, AMBAG aggregates the NAICS sectors into larger categories with similar travel demand patterns, and in other industries, the data are disaggregated to better reflect job functions and trip generation patterns. Table 1 shows the cross-reference between NAICS industries and AMBAG sectors.

Table 12 Cross-reference Between AMBAG Forecast Sectors and NAICS Industries

| Acronym | Description | NAICS ID* | NAICS Description |
|---------|--|-----------|--|
| AGR | Agriculture (field work) | 11* | Agriculture, Forestry, Fishing and Hunting |
| MFG | Manufacturing (incl. crop processing) | 11* | Agriculture, Forestry, Fishing and Hunting |
| | | 21 | Mining, Quarrying, and Oil and Gas Extraction |
| | | 31-33 | Manufacturing |
| TR_CON | Site-based Skilled Trade | 22 | Utilities |
| | | 23 | Construction |
| | | 48-49 | Transportation and Warehousing |
| | | 56 | Administrative & Support & Waste Mgmt. & Remediation |

²⁵ California Employment Development Department, Labor Market Information Division website. Accessed on August 16, 2019 at <http://www.labormarketinfo.edd.ca.gov/LMID/NAICS.html>

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| | | | |
|-----------|---|-------|--|
| | | 92* | Public Administration |
| WHL | Wholesale (incl. agricultural wholesale) | 11* | Agriculture, Forestry, Fishing and Hunting |
| | | 42 | Wholesale Trade |
| RET | Retail (incl. farm stands) | 11* | Agriculture, Forestry, Fishing and Hunting |
| | | 44-45 | Retail Trade |
| FIRE | Financial and Professional Services | 51 | Information |
| | | 52 | Finance and Insurance |
| | | 53 | Real Estate and Rental and Leasing |
| | | 54 | Professional, Scientific, and Technical Services |
| | | 55 | Management of Companies and Enterprises |
| EDU | Education (incl. public schools) | 61 | Educational Services |
| | | 92* | Public Administration |
| HLT | Health Care and Social Assistance | 62 | Health Care and Social Assistance |
| SRV | Other Services | 71 | Arts, Entertainment, and Recreation |
| | | 72 | Accommodation and Food Services |
| | | 81 | Other Services (except Public Administration) |
| PUB | Public (excl. education and transport) | 92* | Public Administration |
| SELF_EMPL | Self-employed | | Self-Employed |

*Note: Some NAICS industry sectors have been divided up, based on business operations and transportation demand, across AMBAG sectors.

Each category is described below.

Industry Sector Definitions

Agriculture (includes agriculture, forestry, fishing, and hunting)

- Establishments primarily engaged in **agriculture** that grow crops or raise animals; establishments that harvest timber; and establishments that harvest animals from a farm, ranch, or their natural habitats.

Examples: Farms; ranches; dairies; greenhouses; nurseries; orchards; grape vineyards; cattle feedlots; logging.

Important note: Within NAICS classifications, support activities for agricultural or animal production (e.g., harvesting contractors, farm labor contractors, crop packaging, warehousing) appear in

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manufacturing, transportation and warehousing, or wholesale. In addition, a comprehensive review of AMBAG region firms listed in the agriculture NAICS sector showed many support activities. AMBAG staff re-classified these to manufacturing, wholesale, or retail.

Site-based Skilled Trade (includes transportation and warehousing, utilities, construction, administrative and support and waste management and remediation services)

- Composed of a variety of sectors, this category includes:
 - establishments that are primarily engaged in the **construction** of buildings or engineering projects, preparation of sites for new construction, and/or subdividing land for sale as building sites.
 - establishments that provide **transportation** of passengers, cargo, **warehousing** and storage of goods, and support activities related to modes of transportation;
 - the **utility** sector which is comprised of establishments engaged in the provision of utility services: electric power, natural gas, steam supply, water supply, and sewage removal; and
 - establishments that perform routine support activities for the day-to-day operations of other organizations (**administrative and support and waste management services and remediation services**).

Examples: Air, rail, water, truck, transit and ground passenger, and pipeline transportation; postal service; couriers and messengers; electric power generation; water and sewage systems; construction of highways and dams, production of a specific component for a project, and construction of buildings (e.g., new work, additions, alterations, etc.); flooring, roofing, and siding contractors; office administrative services; temporary help services; collection agencies; hazardous waste collection.

Note: In NAICS classifications, public transportation services are often coded as “Public Administration.” In the AMBAG framework, public transportation is included here.

Manufacturing (includes mining, quarrying, and oil and gas extraction, manufacturing)

- Composed of two sectors, this category includes:
 - **manufacturing** establishments engaged in the mechanical, physical, or chemical transformation of materials into new products. Typically, these establishments use power-driven machines. However, this also includes establishments that transform materials by hand and are engaged in selling products to the general public made on the same premises from which they are sold; and
 - establishments engaged in **mining, quarrying, and oil and gas extraction** that extract naturally occurring mineral solids (e.g., coal or ores), liquid materials (e.g., crude petroleum), and gases (e.g., natural gas).

Examples: Iron ore mining; industrial sand mining; drilling oil and gas wells; and support activities for mining; fruit and vegetable preserving; animal slaughtering and processing; seafood product preparation and packaging; factories; mills; bakeries; candy stores (that make candy); custom tailors; breweries; wineries; bottled water manufacturing; book printing; iron foundries; paper manufacturing; chemical manufacturing; machine shops; and computer and electronic product manufacturing.

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Wholesale (includes wholesale)

- Includes establishments engaged in **wholesaling** merchandise, typically without transformation, and rendering services related to the sale of merchandise. Wholesalers sell merchandise to other businesses, normally operate from a warehouse or office, and do not advertise to the general public.

Examples: Establishments engaged in wholesaling products, such as motor vehicles, furniture, construction materials, sporting goods, toys, electronic goods, paper and paper products, drugs, textiles, apparel, groceries, newspapers, and tobacco products.

Retail (includes retail)

- Includes establishments engaged primarily in **retailing** merchandise, generally without transformation, and rendering services related to the sale of the merchandise.

Examples: Establishments engaged in retailing merchandise, such as motor vehicle and parts dealers, furniture and home furnishing stores, food and beverage stores, gasoline stations, clothing stores, sporting goods, hobby, book, florists and music stores.

Financial and Professional Services (includes information, finance and insurance, real estate and rental and leasing, professional, scientific, and technical services, management of companies and enterprises)

- Composed of a variety of service-providing sectors, this category includes:
 - establishments engaged in **information** processes (i.e., producing and distributing information and processing data);
 - establishments primarily engaged in **financial transactions** and/or facilitating financial transactions;
 - establishments primarily engaged in **renting, leasing**, and managing **real estate** for others;
 - establishments that specialize in performing **professional, scientific, and technical** activities for others; and
 - establishments that hold the securities of companies and enterprises for the purpose of owning a controlling interest or influencing **management** decisions.

Examples: Motion picture and sound recording industries; broadcasting; data processing and hosting; telecommunications; publishing industries; libraries and archives; commercial banking; credit card issuing; securities brokerage; portfolio management; direct life insurance carriers; passenger car rental; real estate agencies; commercial property managers; legal advice and representation; accounting, bookkeeping, and payroll services; architectural design services; computer services; research services; veterinary services; advertising; consulting; interior design services; public relations agencies.

Services (includes arts, entertainment, and recreation, accommodation and food services, other services)

- Composed of a variety of service-providing sectors, this category includes:
 - leisure and hospitality establishments that operate facilities or provide services to meet varied **arts**, cultural, entertainment, and **recreation** interests;

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- establishments that provide customers with lodging **accommodation** and/or preparing meals, snacks, and beverages for immediate consumption (**food services**); and
- establishments engaged in providing **services** not specifically provided for elsewhere in the classification system. This includes establishments primarily engaged in activities such as equipment and machinery repairing, promoting religious activities, pet care services, etc.
- *Examples:* Dance companies; museums; zoos; nature parks; hotels and motels; campgrounds; caterers; restaurants; general automotive repair; car washes; computer and office machine repair and maintenance; barber shops; nail salons; parking lots and garages; civic and social organizations; political organizations; and labor unions.

Education (includes education)

- Includes establishments that provide instruction, training, and **education** in a wide variety of subjects.

Examples: Elementary and secondary schools; colleges, universities, and professional schools; apprenticeship training; and exam preparation and tutoring.

Note: In NAICS classifications, public schools are often coded as “Public Administration.” In the AMBAG framework, public schools are included in education.

Health Care (includes health care and social assistance)

- Includes establishments that provide **health care** and **social assistance** for individuals.

Examples: Dentists; chiropractors; family planning centers; ambulance services; community food services; temporary shelters; adoption agencies; and child daycare services.

Public (includes government, excl. public schools)

- Includes **public administration** establishments active at the **federal, state, and local** levels that administer, oversee, and manage public programs, and have authority over other institutions within a given area.

Examples: Courts; police protection; executive offices; administrations of public health programs; and administration of economic programs.

Self-Employed

Self-employed workers are freelancers, consultants, business owners and others who do not work on payroll at a specific employer. Self-employed workers may work in any industry or occupation. What distinguishes them from the NAICS sectors listed above is that their work is not tracked in the unemployment insurance program—the primary source of data for employment by industry.

Base Year Data and Re-benchmarking

In 2015 AMBAG staff collected address-level employment data from the California Employment Development Department and InfoUSA. In many cases records matched in both databases, but in many cases there were differences between the two data sources—in industrial classification, number of

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jobs, address, or other characteristics. AMBAG staff conducted an extensive, record-by-record ground-truthing—determining which of the two records was accurate—to assemble a base-year employment database. Through this process, AMBAG also re-classified some records from one industry to another, to better match the trip generation rates. (This step is explained in more detail below.)

The resulting base-year employment database has somewhat different industrial classifications and total employment compared with trend data (1990-2019) from the California Employment Development Department used for the region-level forecast. To reconcile the two, we re-benchmarked the historical series (1990-2019) to reflect the validated base-year employment levels and industrial classifications.

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Attachment 3: Comparison of Population Forecast Methods

In working with AMBAG to produce the 2022 Regional Growth Forecast, PRB conducted an evaluation of several population forecasting methods to ensure that the employment-driven population forecast technique was reasonable and reliable. While any forecast is a best guess given the most current information at the time it is produced, consistent results across several models lend credibility to the forecast results.

PRB compared population forecast results of the 2022 RGF (employment-driven method) with three other population forecasts: a cohort-change ratio (to 2025), a cohort-component forecast (to 2045), and the official, vintage 2019 forecast from the California Department of Finance. Results are presented in the table below.

The cohort-change ratio relied upon estimates of the population by age, race/ethnicity, and sex for the years 2000, 2005, 2010, and 2015. The method applied change ratios from 2005 to 2015 to predict the 2025 population and from 2010 to 2020 to predict the 2030 population.

The cohort-component forecast relied upon 2010 population by age, race/ethnicity, and sex, as well as data from the California Department of Public Health on mortality rates by age and sex, infant mortality rates by race/ethnicity and sex, and fertility rates by age and race/ethnicity. Modest adjustments were made to forecast fertility and mortality rates to reflect modest declines in teen birth rate and stalled improvements in life expectancy. PRB also produced projections under three different migration scenarios—a return to historic migration levels (High), low international migration (Mid), and net out-migration (Low).

The California Department of Finance vintage 2019 figures are presented without adjustment.

Table 13 Comparison of Forecast Methods

| | 2022 RGF | Cohort Change Ratio | Cohort Component High | Cohort Component Mid | Cohort Component Low | California Dept of Finance |
|-------------|----------|------------------------|-----------------------------|----------------------------|----------------------------|----------------------------------|
| 2010 | 732,708 | 732,708 | 732,708 | 732,708 | 732,708 | 732,708 |
| 2015 | 762,241 | 762,676 | 762,676 | 762,676 | 762,676 | 762,318 |
| 2020 | 774,729 | 790,682 | 786,757 | 786,757 | 786,757 | 786,753 |
| 2025 | 800,726 | 814,533 | 818,468 | 808,103 | 801,506 | 804,777 |
| 2030 | 824,992 | 826,866 | 847,469 | 829,061 | 814,722 | 823,570 |
| 2035 | 842,189 | n.a. | 873,209 | 847,730 | 825,168 | 839,044 |
| 2040 | 857,828 | n.a. | 892,057 | 858,677 | 827,536 | 850,477 |
| 2045 | 869,776 | n.a. | 901,742 | 859,912 | 819,970 | 858,292 |

Sources: PRB; California Department of Finance

Attachment 4: Group Quarters and Housing

Residents of the region may live in housing or group quarters. In some cases—such as farmworker housing, senior living facilities, and apartment-style college dorms—it may be less clear whether the living arrangement is housing or group quarters. In addition, some structures—such as vacation rentals or accessory units—may be considered housing for the purposes of the housing inventory, but may not be considered available as part of the residential real estate market. This section provides some clarity on how living arrangements are classified.

Housing

A housing unit is any single-family residential structure (like a house or a manufactured home) or any distinct unit in a multi-unit building where the unit provides privacy for the occupants, and the unit has access to the outside, and occupants can come-and-go as they wish (not a custodial facility), and occupancy is independent of any institutional affiliation.²⁶ Common examples include single family detached units, condominiums, rowhomes, townhomes, apartments, and manufactured housing. The U.S. Census Bureau defines Housing Units as follows:

A housing unit may be a house, an apartment, a mobile home, a group of rooms or a single room that is occupied (or, if vacant, intended for occupancy) as separate living quarters. Separate living quarters are those in which the occupants live separately from any other individuals in the building and which have direct access from outside the building or through a common hall. For vacant units, the criteria of separateness and direct access are applied to the intended occupants whenever possible. If that information cannot be obtained, the criteria are applied to the previous occupants.

Both occupied and vacant housing units are included in the housing unit inventory. Boats, recreational vehicles (RVs), vans, tents, railroad cars, and the like are included only if they are occupied as someone's current place of residence. Vacant mobile homes are included provided they are intended for occupancy on the site where they stand. Vacant mobile homes on dealers' sales lots, at the factory, or in storage yards are excluded from the housing inventory. Also excluded from the housing inventory are quarters being used entirely for nonresidential

²⁶ Todd Graham. 2020. "Local Planning Handbook: Housing Unit vs. Group Quarters," accessed at <https://metro council.org/Handbook/Files/Resources/Fact-Sheet/LAND-USE/Housing-Unit-vs-Group-Quarter.aspx> on January 16, 2021.

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purposes, such as a store or an office, or quarters used for the storage of business supplies or inventory, machinery, or agricultural products.²⁷

It is important to note that the housing definition does not change based on a unit's occupancy status, nor its availability for rent or sale. For practical purposes, in the regional growth forecast units are counted as part of the housing inventory regardless of occupancy or availability in the real estate market. Second homes, vacation rentals, and accessory dwelling units are all counted as housing.

Group Quarters

A group quarters facility is one that houses multiple, unrelated people, where occupants do not have privacy, or there is controlled access to entering/leaving, or it's a facility that houses only an institutional or service-receiving population.²⁸ Common examples include college dormitories, military barracks, assisted living facilities, jails/prisons, and emergency/crisis shelters. In the decennial census, group quarters counts also include the unsheltered population.

The U.S. Census Bureau defines group quarters as follows:

A Group Quarters (GQs) is a place where people live or stay in a group living arrangement that is owned or managed by an entity or organization providing housing and/or services for the residents. These services may include custodial or medical care, as well as other types of assistance, and residency is commonly restricted to those receiving these services. This is not a typical household-type living arrangement. People living in GQs usually are not related to each other. GQs include such places as college residence halls, residential treatment centers, skilled nursing facilities, group homes, military barracks, correctional facilities, workers' dormitories, and facilities for people experiencing homelessness. GQs are defined according to the housing and/or services provided to residents and are identified by Census GQ type codes.²⁹

²⁷ U.S. Census Bureau. "American Community Survey and Puerto Rico Community Survey 2019 Subject Definitions," (December 2020) accessed at https://www2.census.gov/programs-surveys/acs/tech_docs/subject_definitions/2019_ACSSubjectDefinitions.pdf on January 16, 2021.

²⁸ Todd Graham. 2020. "Local Planning Handbook: Housing Unit vs. Group Quarters," accessed at <https://metro council.org/Handbook/Files/Resources/Fact-Sheet/LAND-USE/Housing-Unit-vs-Group-Quarter.aspx> on January 16, 2021.

²⁹ U.S. Census Bureau. "American Community Survey and Puerto Rico Community Survey 2019 Subject Definitions," (December 2020) accessed at https://www2.census.gov/programs-surveys/acs/tech_docs/subject_definitions/2019_ACSSubjectDefinitions.pdf on January 16, 2021.

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Group quarters facilities may house many residents, such as a single dormitory building with dozens of students or a single prison building with thousands of inmates. For this reason, group quarters are counted as population, not as units.

University Housing

University-affiliated housing may be counted as housing or group quarters. In general, part-year student housing is considered group quarters and year-round faculty / student family housing is counted as housing. These distinctions tend to hold even if the university housing structures appear similar to a traditional apartment.

If a university builds a new dormitory building, the number of students housed within that building will be counted as group quarters residents and removed from the calculation for household demand—rather than adding the dormitory as one housing unit (with dozens, or even hundreds, of household occupants) to the forecast.

Universities may also provide faculty and family housing units that may be leased to university-affiliated staff or students and their families. In these cases, because families live together, rentals are year-round, and the living arrangement is not limited to institutional affiliation (i.e. unaffiliated family members or roommates may share the housing), we count those residents as belonging to households and we count the units as part of the housing stock.

Farmworker Housing

Farmworker housing may be counted in the housing inventory or as group quarters. Distinctions follow the rules outlined above. For example, if farmworker housing is restricted to employees of a particular company or the housing is dormitory-style, it would be counted as group quarters. If farmworker housing is not restricted to a particular company (e.g. non-worker family members can share the residence) and is arranged as separate living quarters, it would be counted in the housing unit inventory.

Attachment 5: Jurisdiction Growth Projections

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Capitola

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|-----------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Capitola | 9,918 | 10,224 | 10,108 | 10,485 | 10,794 | 10,957 | 11,049 | 11,126 | 902 | 9% |
| % change | | 3.1% | -1.1% | 3.7% | 2.9% | 1.5% | 0.8% | 0.7% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|--------------|---------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Capitola | 9,770 | 10,076 | 9,960 | 10,333 | 10,637 | 10,799 | 10,888 | 10,964 | 888 | 9% |
| % change | | 3.1% | -1.2% | 3.7% | 2.9% | 1.5% | 0.8% | 0.7% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Capitola | 148 | 148 | 148 | 152 | 157 | 158 | 161 | 162 | 14 | 9% |
| % change | | 0.0% | 0.0% | 2.7% | 3.3% | 0.6% | 1.9% | 0.6% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Capitola | 5,534 | 5,537 | 5,554 | 5,786 | 5,970 | 6,009 | 6,017 | 6,017 | 480 | 9% |
| % change | | 0.1% | 0.3% | 4.2% | 3.2% | 0.7% | 0.1% | 0.0% | | |

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Capitola

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Capitola | 4,626 | 4,694 | 4,773 | 4,952 | 5,087 | 5,134 | 5,151 | 5,152 | 458 | 10% |
| % change | | 1.5% | 1.7% | 3.8% | 2.7% | 0.9% | 0.3% | 0.0% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Capitola | 16.4% | 15.2% | 14.1% | 14.4% | 14.8% | 14.6% | 14.4% | 14.4% | -0.8 | -6% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Capitola | 2.11 | 2.15 | 2.09 | 2.09 | 2.09 | 2.10 | 2.11 | 2.13 | -0.02 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Capitola | | | | | | | | | | |
| Agriculture (field work) | n/a | 7 | 8 | 8 | 8 | 8 | 8 | 8 | 1 | 14% |
| Manufacturing | n/a | 469 | 524 | 526 | 529 | 534 | 539 | 544 | 75 | 16% |
| Site-based Skilled Trade | n/a | 770 | 867 | 884 | 906 | 922 | 942 | 962 | 192 | 25% |
| Wholesale | n/a | 98 | 107 | 107 | 107 | 107 | 107 | 107 | 9 | 9% |
| Retail | n/a | 3,410 | 3,317 | 3,327 | 3,354 | 3,394 | 3,434 | 3,469 | 59 | 2% |
| Financial & Prof. Serv. | n/a | 1,841 | 1,899 | 1,913 | 1,967 | 2,023 | 2,083 | 2,142 | 301 | 16% |
| Education | n/a | 334 | 368 | 370 | 379 | 389 | 399 | 409 | 75 | 22% |
| Health Care & Social Assist | n/a | 1,571 | 1,693 | 1,738 | 1,777 | 1,826 | 1,876 | 1,926 | 355 | 23% |
| Other Services | n/a | 2,493 | 2,761 | 2,784 | 2,872 | 2,952 | 3,032 | 3,112 | 619 | 25% |
| Public | n/a | 298 | 328 | 330 | 335 | 340 | 345 | 350 | 52 | 17% |
| Self-employed | n/a | 375 | 378 | 389 | 399 | 407 | 416 | 425 | 50 | 13% |
| Capitola | n/a | 11,666 | 12,250 | 12,376 | 12,633 | 12,902 | 13,181 | 13,454 | 1,788 | 15% |
| % change | | | 5.0% | 1.0% | 2.1% | 2.1% | 2.2% | 2.1% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Carmel-By-The-Sea

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|--------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Carmel-By-The-Sea | 3,722 | 3,854 | 3,949 | 3,946 | 3,954 | 3,964 | 3,974 | 3,984 | 130 | 3% |
| % change | | 3.5% | 2.5% | -0.1% | 0.2% | 0.3% | 0.3% | 0.3% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|--------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Carmel-By-The-Sea | 3,722 | 3,854 | 3,949 | 3,946 | 3,954 | 3,964 | 3,974 | 3,984 | 130 | 3% |
| % change | | 3.5% | 2.5% | -0.1% | 0.2% | 0.3% | 0.3% | 0.3% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Carmel-By-The-Sea | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | -- |
| % change | | -- | -- | -- | -- | -- | -- | -- | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|--------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Carmel-By-The-Sea | 3,417 | 3,417 | 3,437 | 3,437 | 3,442 | 3,450 | 3,453 | 3,459 | 42 | 1% |
| % change | | 0.0% | 0.6% | 0.0% | 0.1% | 0.2% | 0.1% | 0.2% | | |

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Carmel-By-The-Sea

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|--------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Carmel-By-The-Sea | 2,095 | 2,106 | 2,129 | 2,129 | 2,132 | 2,137 | 2,142 | 2,148 | 42 | 2% |
| % change | | 0.5% | 1.1% | 0.0% | 0.1% | 0.2% | 0.2% | 0.3% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|--------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Carmel-By-The-Sea | 38.7% | 38.4% | 38.1% | 38.1% | 38.1% | 38.1% | 38.0% | 37.9% | -0.5 | -1% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|--------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Carmel-By-The-Sea | 1.78 | 1.83 | 1.85 | 1.85 | 1.85 | 1.85 | 1.86 | 1.85 | 0.02 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Carmel-By-The-Sea | | | | | | | | | | |
| Agriculture (field work) | n/a | 15 | 16 | 16 | 16 | 16 | 16 | 16 | 1 | 7% |
| Manufacturing | n/a | 106 | 118 | 118 | 118 | 118 | 118 | 118 | 12 | 11% |
| Site-based Skilled Trade | n/a | 86 | 97 | 98 | 100 | 100 | 100 | 100 | 14 | 16% |
| Wholesale | n/a | 17 | 19 | 19 | 19 | 20 | 21 | 21 | 4 | 24% |
| Retail | n/a | 645 | 627 | 629 | 633 | 638 | 643 | 649 | 4 | 1% |
| Financial & Prof. Serv. | n/a | 715 | 738 | 745 | 765 | 785 | 808 | 832 | 117 | 16% |
| Education | n/a | 63 | 69 | 70 | 70 | 71 | 71 | 71 | 8 | 13% |
| Health Care & Social Assist | n/a | 61 | 67 | 67 | 67 | 67 | 67 | 67 | 6 | 10% |
| Other Services | n/a | 1,524 | 1,688 | 1,702 | 1,755 | 1,805 | 1,855 | 1,905 | 381 | 25% |
| Public | n/a | 47 | 52 | 52 | 52 | 52 | 52 | 52 | 5 | 11% |
| Self-employed | n/a | 74 | 75 | 77 | 79 | 80 | 82 | 84 | 10 | 14% |
| Carmel-By-The-Sea | n/a | 3,353 | 3,566 | 3,593 | 3,674 | 3,752 | 3,833 | 3,915 | 562 | 17% |
| % change | | | 6.4% | 0.8% | 2.3% | 2.1% | 2.2% | 2.1% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Del Rey Oaks

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Del Rey Oaks | 1,624 | 1,663 | 1,662 | 1,693 | 1,734 | 1,859 | 2,330 | 2,650 | 987 | 59% |
| % change | | 2.4% | -0.1% | 1.9% | 2.4% | 7.2% | 25.3% | 13.7% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Del Rey Oaks | 1,624 | 1,663 | 1,662 | 1,693 | 1,734 | 1,859 | 2,330 | 2,650 | 987 | 59% |
| % change | | 2.4% | -0.1% | 1.9% | 2.4% | 7.2% | 25.3% | 13.7% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Del Rey Oaks | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | -- |
| % change | | -- | -- | -- | -- | -- | -- | -- | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|---------------------|------------|------------|------------|------------|------------|------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Del Rey Oaks | 741 | 741 | 741 | 762 | 809 | 848 | 1,052 | 1,195 | 454 | 61% |
| % change | | 0.0% | 0.0% | 2.8% | 6.2% | 4.8% | 24.1% | 13.6% | | |

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Final 2022 Regional Growth Forecast

Del Rey Oaks

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|---------------------|------------|------------|------------|------------|------------|------------|------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Del Rey Oaks | 701 | 693 | 683 | 696 | 713 | 764 | 958 | 1,088 | 395 | 57% |
| % change | | -1.1% | -1.4% | 1.9% | 2.4% | 7.2% | 25.4% | 13.6% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|---------------------|-------------|-------------|-------------|-------------|--------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Del Rey Oaks | 5.4% | 6.5% | 7.8% | 8.7% | 11.9% | 9.9% | 8.9% | 9.0% | 2.5 | 38% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Del Rey Oaks | 2.32 | 2.40 | 2.43 | 2.43 | 2.43 | 2.43 | 2.43 | 2.44 | 0.04 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Del Rey Oaks | | | | | | | | | | |
| Agriculture (field work) | n/a | 7 | 8 | 8 | 8 | 8 | 8 | 8 | 1 | 14% |
| Manufacturing | n/a | 13 | 15 | 15 | 15 | 15 | 15 | 15 | 2 | 15% |
| Site-based Skilled Trade | n/a | 40 | 45 | 45 | 45 | 45 | 45 | 45 | 5 | 13% |
| Wholesale | n/a | 13 | 14 | 14 | 14 | 15 | 16 | 16 | 3 | 23% |
| Retail | n/a | 126 | 123 | 123 | 125 | 128 | 131 | 135 | 9 | 7% |
| Financial & Prof. Serv. | n/a | 150 | 155 | 156 | 161 | 166 | 171 | 176 | 26 | 17% |
| Education | n/a | 21 | 23 | 23 | 26 | 27 | 28 | 28 | 7 | 33% |
| Health Care & Social Assist | n/a | 17 | 18 | 18 | 18 | 18 | 18 | 18 | 1 | 6% |
| Other Services | n/a | 264 | 292 | 294 | 304 | 313 | 323 | 332 | 68 | 26% |
| Public | n/a | 9 | 10 | 10 | 10 | 10 | 10 | 10 | 1 | 11% |
| Self-employed | n/a | 45 | 45 | 47 | 48 | 49 | 50 | 51 | 6 | 13% |
| Del Rey Oaks | n/a | 705 | 748 | 753 | 774 | 794 | 815 | 834 | 129 | 18% |
| % change | | | 6.1% | 0.7% | 2.8% | 2.6% | 2.6% | 2.3% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Gonzales

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|-----------------|--------------|--------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Gonzales | 8,187 | 8,441 | 8,506 | 9,650 | 13,492 | 14,630 | 15,398 | 15,711 | 7,270 | 86% |
| % change | | 3.1% | 0.8% | 13.4% | 39.8% | 8.4% | 5.2% | 2.0% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|--------------|--------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Gonzales | 8,181 | 8,435 | 8,500 | 9,643 | 13,483 | 14,620 | 15,387 | 15,700 | 7,265 | 86% |
| % change | | 3.1% | 0.8% | 13.4% | 39.8% | 8.4% | 5.2% | 2.0% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|----------|----------|----------|----------|----------|-----------|-----------|-----------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Gonzales | 6 | 6 | 6 | 7 | 9 | 10 | 11 | 11 | 5 | 83% |
| % change | | 0.0% | 0.0% | 16.7% | 28.6% | 11.1% | 10.0% | 0.0% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Gonzales | 1,989 | 1,987 | 1,987 | 2,399 | 3,630 | 4,182 | 4,474 | 4,626 | 2,639 | 133% |
| % change | | -0.1% | 0.0% | 20.7% | 51.3% | 15.2% | 7.0% | 3.4% | | |

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Final 2022 Regional Growth Forecast

Gonzales

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Gonzales | 1,906 | 1,895 | 1,885 | 2,263 | 3,388 | 3,861 | 4,111 | 4,251 | 2,356 | 124% |
| % change | | -0.6% | -0.5% | 20.1% | 49.7% | 14.0% | 6.5% | 3.4% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|-----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Gonzales | 4.2% | 4.6% | 5.1% | 5.7% | 6.7% | 7.7% | 8.1% | 8.1% | 3.5 | 75% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Gonzales | 4.29 | 4.45 | 4.51 | 4.26 | 3.98 | 3.79 | 3.74 | 3.69 | -0.76 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Gonzales | | | | | | | | | | |
| Agriculture (field work) | n/a | 1,874 | 2,052 | 2,053 | 2,058 | 2,063 | 2,068 | 2,073 | 199 | 11% |
| Manufacturing | n/a | 267 | 298 | 301 | 306 | 306 | 306 | 306 | 39 | 15% |
| Site-based Skilled Trade | n/a | 1,434 | 1,614 | 1,657 | 1,725 | 1,781 | 1,844 | 1,910 | 476 | 33% |
| Wholesale | n/a | 1,240 | 1,351 | 1,345 | 1,388 | 1,428 | 1,468 | 1,508 | 268 | 22% |
| Retail | n/a | 186 | 181 | 186 | 196 | 206 | 206 | 206 | 20 | 11% |
| Financial & Prof. Serv. | n/a | 34 | 35 | 35 | 36 | 36 | 37 | 37 | 3 | 9% |
| Education | n/a | 208 | 229 | 230 | 235 | 240 | 245 | 250 | 42 | 20% |
| Health Care & Social Assist | n/a | 141 | 153 | 158 | 163 | 168 | 173 | 178 | 37 | 26% |
| Other Services | n/a | 210 | 232 | 233 | 240 | 245 | 250 | 255 | 45 | 21% |
| Public | n/a | 114 | 125 | 126 | 126 | 126 | 129 | 134 | 20 | 18% |
| Self-employed | n/a | 56 | 56 | 58 | 60 | 61 | 62 | 63 | 7 | 13% |
| Gonzales | n/a | 5,764 | 6,326 | 6,382 | 6,533 | 6,660 | 6,788 | 6,920 | 1,156 | 20% |
| % change | | | 9.8% | 0.9% | 2.4% | 1.9% | 1.9% | 1.9% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Greenfield

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Greenfield | 16,330 | 17,172 | 18,284 | 19,342 | 19,734 | 19,961 | 20,202 | 20,433 | 3,261 | 19% |
| % change | | 5.2% | 6.5% | 5.8% | 2.0% | 1.2% | 1.2% | 1.1% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Greenfield | 16,301 | 17,143 | 18,255 | 19,311 | 19,703 | 19,929 | 20,170 | 20,400 | 3,257 | 19% |
| % change | | 5.2% | 6.5% | 5.8% | 2.0% | 1.1% | 1.2% | 1.1% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Greenfield | 29 | 29 | 29 | 31 | 31 | 32 | 32 | 33 | 4 | 14% |
| % change | | 0.0% | 0.0% | 6.9% | 0.0% | 3.2% | 0.0% | 3.1% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Greenfield | 3,752 | 3,794 | 3,981 | 4,359 | 4,766 | 5,047 | 5,164 | 5,238 | 1,444 | 38% |
| % change | | 1.1% | 4.9% | 9.5% | 9.3% | 5.9% | 2.3% | 1.4% | | |

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Final 2022 Regional Growth Forecast

Greenfield

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Greenfield | 3,460 | 3,506 | 3,686 | 4,033 | 4,358 | 4,588 | 4,693 | 4,744 | 1,238 | 35% |
| % change | | 1.3% | 5.1% | 9.4% | 8.1% | 5.3% | 2.3% | 1.1% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|-------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Greenfield | 7.8% | 7.6% | 7.4% | 7.5% | 8.6% | 9.1% | 9.1% | 9.4% | 1.8 | 24% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Greenfield | 4.71 | 4.89 | 4.95 | 4.79 | 4.52 | 4.34 | 4.30 | 4.30 | -0.59 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Greenfield | | | | | | | | | | |
| Agriculture (field work) | n/a | 5,419 | 5,934 | 5,938 | 5,956 | 5,976 | 5,996 | 6,016 | 597 | 11% |
| Manufacturing | n/a | 34 | 38 | 38 | 38 | 38 | 38 | 38 | 4 | 12% |
| Site-based Skilled Trade | n/a | 199 | 224 | 254 | 285 | 315 | 347 | 382 | 183 | 92% |
| Wholesale | n/a | 85 | 93 | 105 | 130 | 155 | 180 | 205 | 120 | 141% |
| Retail | n/a | 227 | 221 | 222 | 224 | 229 | 234 | 238 | 11 | 5% |
| Financial & Prof. Serv. | n/a | 141 | 146 | 147 | 152 | 157 | 162 | 167 | 26 | 18% |
| Education | n/a | 374 | 412 | 415 | 425 | 435 | 445 | 455 | 81 | 22% |
| Health Care & Social Assist | n/a | 285 | 309 | 319 | 328 | 338 | 348 | 358 | 73 | 26% |
| Other Services | n/a | 257 | 284 | 286 | 296 | 306 | 316 | 326 | 69 | 27% |
| Public | n/a | 150 | 165 | 166 | 167 | 167 | 170 | 175 | 25 | 17% |
| Self-employed | n/a | 56 | 56 | 58 | 60 | 61 | 62 | 63 | 7 | 13% |
| Greenfield | n/a | 7,227 | 7,882 | 7,948 | 8,061 | 8,177 | 8,298 | 8,423 | 1,196 | 17% |
| % change | | | 9.1% | 0.8% | 1.4% | 1.4% | 1.5% | 1.5% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Hollister

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Hollister | 34,928 | 37,314 | 40,646 | 42,604 | 43,327 | 44,421 | 45,345 | 45,599 | 8,285 | 22% |
| % change | | 6.8% | 8.9% | 4.8% | 1.7% | 2.5% | 2.1% | 0.6% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Hollister | 34,813 | 37,077 | 40,412 | 42,361 | 43,078 | 44,171 | 45,090 | 45,343 | 8,266 | 22% |
| % change | | 6.5% | 9.0% | 4.8% | 1.7% | 2.5% | 2.1% | 0.6% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Hollister | 115 | 237 | 234 | 243 | 249 | 250 | 255 | 256 | 19 | 8% |
| % change | | 106.1% | -1.3% | 3.8% | 2.5% | 0.4% | 2.0% | 0.4% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Hollister | 10,401 | 10,757 | 11,917 | 12,501 | 13,177 | 13,701 | 14,054 | 14,122 | 3,365 | 31% |
| % change | | 3.4% | 10.8% | 4.9% | 5.4% | 4.0% | 2.6% | 0.5% | | |

November 11, 2020

Final 2022 Regional Growth Forecast Hollister

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|------------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Hollister | 9,860 | 10,334 | 11,548 | 12,103 | 12,724 | 13,203 | 13,526 | 13,582 | 3,248 | 31% |
| % change | | 4.8% | 11.7% | 4.8% | 5.1% | 3.8% | 2.4% | 0.4% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Hollister | 5.2% | 3.9% | 3.1% | 3.2% | 3.4% | 3.6% | 3.8% | 3.8% | -0.1 | -3% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Hollister | 3.53 | 3.59 | 3.50 | 3.50 | 3.39 | 3.35 | 3.33 | 3.34 | -0.25 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Hollister | | | | | | | | | | |
| Agriculture (field work) | n/a | 209 | 229 | 229 | 229 | 229 | 229 | 229 | 20 | 10% |
| Manufacturing | n/a | 1,511 | 1,688 | 1,697 | 1,714 | 1,724 | 1,734 | 1,744 | 233 | 15% |
| Site-based Skilled Trade | n/a | 2,178 | 2,451 | 2,505 | 2,599 | 2,673 | 2,749 | 2,837 | 659 | 30% |
| Wholesale | n/a | 426 | 464 | 457 | 462 | 467 | 472 | 477 | 51 | 12% |
| Retail | n/a | 1,910 | 1,858 | 1,863 | 1,877 | 1,897 | 1,917 | 1,937 | 27 | 1% |
| Financial & Prof. Serv. | n/a | 1,107 | 1,142 | 1,156 | 1,239 | 1,327 | 1,417 | 1,509 | 402 | 36% |
| Education | n/a | 847 | 933 | 939 | 962 | 983 | 1,006 | 1,036 | 189 | 22% |
| Health Care & Social Assist | n/a | 2,162 | 2,347 | 2,423 | 2,487 | 2,553 | 2,622 | 2,693 | 531 | 25% |
| Other Services | n/a | 1,955 | 2,165 | 2,200 | 2,330 | 2,450 | 2,574 | 2,699 | 744 | 38% |
| Public | n/a | 829 | 911 | 916 | 931 | 946 | 965 | 985 | 156 | 19% |
| Self-employed | n/a | 1,294 | 1,304 | 1,343 | 1,377 | 1,406 | 1,436 | 1,467 | 173 | 13% |
| Hollister | n/a | 14,428 | 15,492 | 15,728 | 16,207 | 16,655 | 17,121 | 17,613 | 3,185 | 22% |
| % change | | | 7.4% | 1.5% | 3.0% | 2.8% | 2.8% | 2.9% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

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Final 2022 Regional Growth Forecast

King City

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| King City | 12,874 | 13,736 | 14,797 | 15,376 | 16,101 | 16,689 | 16,881 | 17,064 | 3,328 | 24% |
| % change | | 6.7% | 7.7% | 3.9% | 4.7% | 3.7% | 1.2% | 1.1% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| King City | 12,815 | 13,677 | 14,588 | 15,167 | 15,892 | 16,480 | 16,672 | 16,855 | 3,178 | 23% |
| % change | | 6.7% | 6.7% | 4.0% | 4.8% | 3.7% | 1.2% | 1.1% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|-----------|-----------|------------|------------|------------|------------|------------|------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| King City | 59 | 59 | 209 | 209 | 209 | 209 | 209 | 209 | 150 | 254% |
| % change | | 0.0% | 254.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| King City | 3,218 | 3,283 | 3,432 | 3,672 | 4,002 | 4,282 | 4,356 | 4,403 | 1,120 | 34% |
| % change | | 2.0% | 4.5% | 7.0% | 9.0% | 7.0% | 1.7% | 1.1% | | |

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Final 2022 Regional Growth Forecast

King City

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| King City | 3,008 | 3,094 | 3,258 | 3,476 | 3,759 | 3,992 | 4,049 | 4,091 | 997 | 32% |
| % change | | 2.9% | 5.3% | 6.7% | 8.1% | 6.2% | 1.4% | 1.0% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| King City | 6.5% | 5.8% | 5.1% | 5.3% | 6.1% | 6.8% | 7.0% | 7.1% | 1.3 | 23% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| King City | 4.26 | 4.42 | 4.48 | 4.36 | 4.23 | 4.13 | 4.12 | 4.12 | -0.30 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| King City | | | | | | | | | | |
| Agriculture (field work) | n/a | 684 | 774 | 775 | 778 | 785 | 791 | 796 | 112 | 16% |
| Manufacturing | n/a | 265 | 308 | 309 | 310 | 312 | 317 | 322 | 57 | 22% |
| Site-based Skilled Trade | n/a | 474 | 538 | 549 | 564 | 576 | 589 | 603 | 129 | 27% |
| Wholesale | n/a | 1,514 | 1,649 | 1,623 | 1,643 | 1,658 | 1,673 | 1,688 | 174 | 11% |
| Retail | n/a | 1,023 | 995 | 999 | 1,006 | 1,017 | 1,030 | 1,044 | 21 | 2% |
| Financial & Prof. Serv. | n/a | 295 | 305 | 306 | 311 | 316 | 321 | 326 | 31 | 11% |
| Education | n/a | 573 | 631 | 635 | 649 | 664 | 686 | 706 | 133 | 23% |
| Health Care & Social Assist | n/a | 1,632 | 1,777 | 1,828 | 1,872 | 1,921 | 1,973 | 2,028 | 396 | 24% |
| Other Services | n/a | 607 | 667 | 669 | 676 | 690 | 702 | 716 | 109 | 18% |
| Public | n/a | 443 | 487 | 489 | 495 | 503 | 516 | 531 | 88 | 20% |
| Self-employed | n/a | 63 | 64 | 66 | 67 | 69 | 71 | 72 | 9 | 14% |
| King City | n/a | 7,573 | 8,195 | 8,248 | 8,371 | 8,511 | 8,669 | 8,832 | 1,259 | 17% |
| % change | | | 8.2% | 0.6% | 1.5% | 1.7% | 1.9% | 1.9% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

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Final 2022 Regional Growth Forecast

Marina

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Marina (Total) | 19,718 | 21,057 | 22,321 | 23,723 | 25,126 | 26,713 | 28,433 | 30,044 | 8,987 | 43% |
| % change | | 6.8% | 6.0% | 6.3% | 5.9% | 6.3% | 6.4% | 5.7% | | |
| <i>Marina balance</i> | <i>19,084</i> | <i>20,037</i> | <i>21,371</i> | <i>22,293</i> | <i>22,841</i> | <i>23,238</i> | <i>23,768</i> | <i>24,237</i> | <i>4,200</i> | <i>21%</i> |
| <i>CSUMB</i> | <i>634</i> | <i>1,020</i> | <i>950</i> | <i>1,430</i> | <i>2,285</i> | <i>3,475</i> | <i>4,665</i> | <i>5,807</i> | <i>4,787</i> | <i>469%</i> |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Marina (Total) | 18,827 | 19,780 | 21,139 | 22,024 | 22,598 | 23,254 | 23,853 | 24,064 | 4,284 | 22% |
| % change | | 5.1% | 6.9% | 4.2% | 2.6% | 2.9% | 2.6% | 0.9% | | |
| <i>Marina balance</i> | <i>18,827</i> | <i>19,780</i> | <i>21,139</i> | <i>22,024</i> | <i>22,564</i> | <i>22,959</i> | <i>23,480</i> | <i>23,944</i> | <i>4,164</i> | <i>21%</i> |
| <i>CSUMB</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>34</i> | <i>295</i> | <i>373</i> | <i>120</i> | <i>120</i> | <i>--</i> |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Marina (Total) | 891 | 1,277 | 1,182 | 1,699 | 2,528 | 3,459 | 4,580 | 5,980 | 4,703 | 368% |
| % change | | 43.3% | -7.4% | 43.7% | 48.8% | 36.8% | 32.4% | 30.6% | | |
| <i>Marina balance</i> | <i>257</i> | <i>257</i> | <i>232</i> | <i>269</i> | <i>277</i> | <i>279</i> | <i>288</i> | <i>293</i> | <i>36</i> | <i>14%</i> |
| <i>CSUMB</i> | <i>634</i> | <i>1,020</i> | <i>950</i> | <i>1,430</i> | <i>2,251</i> | <i>3,180</i> | <i>4,292</i> | <i>5,687</i> | <i>4,667</i> | <i>458%</i> |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Marina (Total) | 7,200 | 7,334 | 7,784 | 8,277 | 8,837 | 9,265 | 9,521 | 9,693 | 2,359 | 32% |
| % change | | 1.9% | 6.1% | 6.3% | 6.8% | 4.8% | 2.8% | 1.8% | | |
| <i>Marina balance</i> | <i>7,200</i> | <i>7,334</i> | <i>7,784</i> | <i>8,277</i> | <i>8,832</i> | <i>9,205</i> | <i>9,445</i> | <i>9,617</i> | <i>2,283</i> | <i>31%</i> |
| <i>CSUMB</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>5</i> | <i>60</i> | <i>76</i> | <i>76</i> | <i>76</i> | <i>--</i> |

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Final 2022 Regional Growth Forecast

Marina

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Marina (Total) | 6,845 | 6,928 | 7,311 | 7,762 | 8,211 | 8,535 | 8,749 | 8,907 | 1,979 | 29% |
| % change | | 1.2% | 5.5% | 6.2% | 5.8% | 3.9% | 2.5% | 1.8% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|---------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Marina | 4.9% | 5.5% | 6.1% | 6.2% | 7.1% | 7.9% | 8.1% | 8.1% | 2.6 | 46% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Marina | 2.75 | 2.86 | 2.89 | 2.84 | 2.75 | 2.72 | 2.73 | 2.70 | -0.15 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Marina | | | | | | | | | | |
| Agriculture (field work) | n/a | 45 | 45 | 45 | 45 | 45 | 45 | 45 | 0 | 0% |
| Manufacturing | n/a | 94 | 105 | 105 | 105 | 105 | 105 | 105 | 11 | 12% |
| Site-based Skilled Trade | n/a | 1,002 | 1,128 | 1,150 | 1,180 | 1,201 | 1,228 | 1,257 | 255 | 25% |
| Wholesale | n/a | 196 | 214 | 210 | 212 | 212 | 212 | 212 | 16 | 8% |
| Retail | n/a | 1,063 | 1,034 | 1,038 | 1,046 | 1,056 | 1,066 | 1,076 | 13 | 1% |
| Financial & Prof. Serv. | n/a | 381 | 393 | 395 | 405 | 415 | 425 | 435 | 54 | 14% |
| Education | n/a | 390 | 430 | 433 | 443 | 453 | 474 | 499 | 109 | 28% |
| Health Care & Social Assist | n/a | 566 | 615 | 635 | 653 | 672 | 692 | 712 | 146 | 26% |
| Other Services | n/a | 1,202 | 1,331 | 1,342 | 1,384 | 1,426 | 1,467 | 1,507 | 305 | 25% |
| Public | n/a | 827 | 909 | 914 | 929 | 944 | 962 | 982 | 155 | 19% |
| Self-employed | n/a | 341 | 344 | 354 | 363 | 370 | 379 | 387 | 46 | 13% |
| Marina Total | n/a | 6,107 | 6,548 | 6,621 | 6,765 | 6,899 | 7,055 | 7,217 | 1,110 | 18% |
| % change | | | 7.2% | 1.1% | 2.2% | 2.0% | 2.3% | 2.3% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Monterey

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Monterey (Total) | 27,810 | 28,086 | 28,170 | 28,044 | 28,650 | 29,032 | 29,342 | 29,639 | 1,553 | 6% |
| % change | | 1.0% | 0.3% | -0.4% | 2.2% | 1.3% | 1.1% | 1.0% | | |
| <i>Monterey balance</i> | <i>23,583</i> | <i>24,095</i> | <i>24,749</i> | <i>24,623</i> | <i>25,229</i> | <i>25,611</i> | <i>25,921</i> | <i>26,218</i> | <i>2,123</i> | <i>9%</i> |
| <i>DLI & Naval Postgrad</i> | <i>4,227</i> | <i>3,991</i> | <i>3,421</i> | <i>3,421</i> | <i>3,421</i> | <i>3,421</i> | <i>3,421</i> | <i>3,421</i> | <i>-570</i> | <i>-14%</i> |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Monterey (Total) | 25,307 | 25,605 | 25,637 | 25,511 | 26,117 | 26,499 | 26,809 | 27,106 | 1,501 | 6% |
| % change | | 1.2% | 0.1% | -0.5% | 2.4% | 1.5% | 1.2% | 1.1% | | |
| <i>Monterey balance</i> | <i>23,148</i> | <i>23,671</i> | <i>24,214</i> | <i>24,088</i> | <i>24,694</i> | <i>25,076</i> | <i>25,386</i> | <i>25,683</i> | <i>2,012</i> | <i>8%</i> |
| <i>DLI & Naval Postgrad</i> | <i>2,159</i> | <i>1,934</i> | <i>1,423</i> | <i>1,423</i> | <i>1,423</i> | <i>1,423</i> | <i>1,423</i> | <i>1,423</i> | <i>-511</i> | <i>-26%</i> |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Monterey (Total) | 2,503 | 2,481 | 2,533 | 2,533 | 2,533 | 2,533 | 2,533 | 2,533 | 52 | 2% |
| % change | | -0.9% | 2.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | |
| <i>Monterey balance</i> | <i>435</i> | <i>424</i> | <i>535</i> | <i>535</i> | <i>535</i> | <i>535</i> | <i>535</i> | <i>535</i> | <i>111</i> | <i>26%</i> |
| <i>DLI & Naval Postgrad</i> | <i>2,068</i> | <i>2,057</i> | <i>1,998</i> | <i>1,998</i> | <i>1,998</i> | <i>1,998</i> | <i>1,998</i> | <i>1,998</i> | <i>-59</i> | <i>-3%</i> |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|---------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Monterey (Total) | 13,584 | 13,637 | 13,705 | 13,705 | 13,920 | 14,209 | 14,402 | 14,549 | 912 | 7% |
| % change | | 0.4% | 0.5% | 0.0% | 1.6% | 2.1% | 1.4% | 1.0% | | |
| <i>Monterey balance</i> | <i>13,152</i> | <i>13,205</i> | <i>13,273</i> | <i>13,273</i> | <i>13,488</i> | <i>13,777</i> | <i>13,970</i> | <i>14,117</i> | <i>912</i> | <i>7%</i> |
| <i>DLI & Naval Postgrad</i> | <i>432</i> | <i>432</i> | <i>432</i> | <i>432</i> | <i>432</i> | <i>432</i> | <i>432</i> | <i>432</i> | <i>0</i> | <i>0%</i> |

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Final 2022 Regional Growth Forecast

Monterey

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|-------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Monterey (Total) | 12,184 | 11,995 | 11,981 | 11,981 | 12,211 | 12,394 | 12,543 | 12,673 | 678 | 6% |
| % change | | -1.6% | -0.1% | 0.0% | 1.9% | 1.5% | 1.2% | 1.0% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Monterey | 10.3% | 12.0% | 12.6% | 12.6% | 12.3% | 12.8% | 12.9% | 12.9% | 0.9 | 7% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Monterey | 2.08 | 2.13 | 2.14 | 2.13 | 2.14 | 2.14 | 2.14 | 2.14 | 0.00 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Monterey | | | | | | | | | | |
| Agriculture (field work) | n/a | 57 | 60 | 60 | 60 | 60 | 60 | 60 | 3 | 5% |
| Manufacturing | n/a | 1,004 | 1,127 | 1,131 | 1,136 | 1,140 | 1,144 | 1,148 | 144 | 14% |
| Site-based Skilled Trade | n/a | 2,758 | 3,104 | 3,163 | 3,232 | 3,281 | 3,351 | 3,417 | 659 | 24% |
| Wholesale | n/a | 740 | 806 | 795 | 805 | 811 | 819 | 829 | 89 | 12% |
| Retail | n/a | 4,080 | 3,969 | 3,981 | 4,012 | 4,052 | 4,097 | 4,142 | 62 | 2% |
| Financial & Prof. Serv. | n/a | 6,372 | 6,575 | 6,625 | 6,783 | 6,958 | 7,134 | 7,312 | 940 | 15% |
| Education | n/a | 3,082 | 3,419 | 3,431 | 3,507 | 3,582 | 3,672 | 3,770 | 688 | 22% |
| Health Care & Social Assist | n/a | 8,335 | 9,061 | 9,360 | 9,622 | 9,879 | 10,146 | 10,425 | 2,090 | 25% |
| Other Services | n/a | 9,037 | 10,007 | 10,086 | 10,403 | 10,696 | 10,991 | 11,289 | 2,252 | 25% |
| Public | n/a | 1,886 | 2,073 | 2,083 | 2,114 | 2,144 | 2,183 | 2,229 | 343 | 18% |
| Self-employed | n/a | 782 | 788 | 812 | 832 | 849 | 868 | 888 | 106 | 14% |
| Monterey Total | n/a | 38,133 | 40,989 | 41,527 | 42,506 | 43,452 | 44,465 | 45,509 | 7,376 | 19% |
| % change | | | 7.5% | 1.3% | 2.4% | 2.2% | 2.3% | 2.3% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Pacific Grove

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Pacific Grove | 15,041 | 15,460 | 15,265 | 15,290 | 15,395 | 15,530 | 15,676 | 15,817 | 357 | 2% |
| % change | | 2.8% | -1.3% | 0.2% | 0.7% | 0.9% | 0.9% | 0.9% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Pacific Grove | 14,686 | 15,105 | 14,910 | 14,935 | 15,040 | 15,175 | 15,315 | 15,453 | 348 | 2% |
| % change | | 2.9% | -1.3% | 0.2% | 0.7% | 0.9% | 0.9% | 0.9% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Pacific Grove | 355 | 355 | 355 | 355 | 355 | 355 | 361 | 364 | 9 | 3% |
| % change | | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.7% | 0.8% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Pacific Grove | 8,169 | 8,184 | 8,201 | 8,214 | 8,267 | 8,336 | 8,400 | 8,463 | 279 | 3% |
| % change | | 0.2% | 0.2% | 0.2% | 0.6% | 0.8% | 0.8% | 0.8% | | |

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Final 2022 Regional Growth Forecast

Pacific Grove

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Pacific Grove | 7,020 | 6,957 | 6,779 | 6,790 | 6,838 | 6,899 | 6,956 | 7,012 | 55 | 1% |
| % change | | -0.9% | -2.6% | 0.2% | 0.7% | 0.9% | 0.8% | 0.8% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Pacific Grove | 14.1% | 15.0% | 17.3% | 17.3% | 17.3% | 17.2% | 17.2% | 17.1% | 2.2 | 14% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Pacific Grove | 2.09 | 2.17 | 2.20 | 2.20 | 2.20 | 2.20 | 2.20 | 2.20 | 0.03 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Pacific Grove | n/a | 7,470 | 8,016 | 8,061 | 8,152 | 8,244 | 8,343 | 8,445 | 975 | 13% |
| % change | | | 7.3% | 0.6% | 1.1% | 1.1% | 1.2% | 1.2% | | |
| Agriculture (field work) | n/a | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 0 | 0% |
| Manufacturing | n/a | 75 | 84 | 84 | 84 | 84 | 84 | 84 | 9 | 12% |
| Site-based Skilled Trade | n/a | 294 | 331 | 336 | 344 | 348 | 355 | 360 | 66 | 22% |
| Wholesale | n/a | 90 | 98 | 98 | 98 | 98 | 98 | 98 | 8 | 9% |
| Retail | n/a | 681 | 662 | 664 | 670 | 680 | 690 | 699 | 18 | 3% |
| Financial & Prof. Serv. | n/a | 1,050 | 1,083 | 1,089 | 1,099 | 1,109 | 1,119 | 1,129 | 79 | 8% |
| Education | n/a | 443 | 458 | 461 | 470 | 480 | 490 | 500 | 57 | 13% |
| Health Care & Social Assist | n/a | 451 | 480 | 490 | 503 | 514 | 524 | 534 | 83 | 18% |
| Other Services | n/a | 3,696 | 4,092 | 4,099 | 4,131 | 4,165 | 4,202 | 4,241 | 545 | 15% |
| Public | n/a | 353 | 388 | 390 | 395 | 400 | 408 | 418 | 65 | 18% |
| Self-employed | n/a | 333 | 336 | 346 | 354 | 362 | 369 | 378 | 45 | 14% |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

November 11, 2020

Final 2022 Regional Growth Forecast

Salinas

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Salinas | 150,441 | 158,059 | 162,222 | 166,226 | 170,459 | 173,393 | 175,358 | 177,128 | 19,069 | 12% |
| % change | | 5.1% | 2.6% | 2.5% | 2.5% | 1.7% | 1.1% | 1.0% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Salinas | 147,976 | 155,733 | 160,013 | 163,951 | 168,117 | 171,032 | 172,945 | 174,699 | 18,966 | 12% |
| % change | | 5.2% | 2.7% | 2.5% | 2.5% | 1.7% | 1.1% | 1.0% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Salinas | 2,465 | 2,326 | 2,209 | 2,275 | 2,342 | 2,361 | 2,413 | 2,429 | 103 | 4% |
| % change | | -5.6% | -5.0% | 3.0% | 2.9% | 0.8% | 2.2% | 0.7% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Salinas | 42,651 | 43,001 | 43,411 | 45,552 | 48,673 | 50,968 | 52,229 | 53,150 | 10,149 | 24% |
| % change | | 0.8% | 1.0% | 4.9% | 6.9% | 4.7% | 2.5% | 1.8% | | |

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Final 2022 Regional Growth Forecast

Salinas

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Salinas | 40,387 | 40,952 | 41,542 | 43,558 | 46,215 | 48,066 | 49,052 | 49,873 | 8,921 | 22% |
| % change | | 1.4% | 1.4% | 4.9% | 6.1% | 4.0% | 2.1% | 1.7% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Salinas | 5.3% | 4.8% | 4.3% | 4.4% | 5.1% | 5.7% | 6.1% | 6.2% | 1.4 | 29% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Salinas | 3.66 | 3.80 | 3.85 | 3.76 | 3.64 | 3.56 | 3.53 | 3.50 | -0.30 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Salinas | | | | | | | | | | |
| Agriculture (field work) | n/a | 7,502 | 8,240 | 8,245 | 8,270 | 8,295 | 8,321 | 8,347 | 845 | 11% |
| Manufacturing | n/a | 1,928 | 2,158 | 2,166 | 2,178 | 2,188 | 2,198 | 2,208 | 280 | 15% |
| Site-based Skilled Trade | n/a | 8,555 | 9,633 | 9,824 | 10,073 | 10,249 | 10,472 | 10,707 | 2,152 | 25% |
| Wholesale | n/a | 8,580 | 9,347 | 9,203 | 9,316 | 9,403 | 9,488 | 9,575 | 995 | 12% |
| Retail | n/a | 8,750 | 8,511 | 8,536 | 8,600 | 8,705 | 8,815 | 8,926 | 176 | 2% |
| Financial & Prof. Serv. | n/a | 6,025 | 6,217 | 6,277 | 6,455 | 6,643 | 6,834 | 7,027 | 1,002 | 17% |
| Education | n/a | 4,821 | 5,310 | 5,345 | 5,462 | 5,580 | 5,718 | 5,876 | 1,055 | 22% |
| Health Care & Social Assist | n/a | 11,110 | 12,062 | 12,452 | 12,783 | 13,125 | 13,479 | 13,849 | 2,739 | 25% |
| Other Services | n/a | 7,766 | 8,608 | 8,675 | 8,948 | 9,189 | 9,419 | 9,669 | 1,903 | 25% |
| Public | n/a | 7,081 | 7,890 | 7,929 | 8,046 | 8,160 | 8,311 | 8,489 | 1,408 | 20% |
| Self-employed | n/a | 891 | 898 | 925 | 948 | 968 | 989 | 1,010 | 119 | 13% |
| Salinas | n/a | 73,009 | 78,874 | 79,577 | 81,079 | 82,505 | 84,044 | 85,683 | 12,674 | 17% |
| % change | | | 8.0% | 0.9% | 1.9% | 1.8% | 1.9% | 2.0% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Sand City

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|------------------|------------|------------|------------|------------|------------|------------|--------------|--------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Sand City | 334 | 361 | 385 | 430 | 516 | 756 | 1,012 | 1,198 | 837 | 232% |
| % change | | 8.1% | 6.6% | 11.7% | 20.0% | 46.5% | 33.9% | 18.4% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|------------|------------|------------|------------|------------|------------|------------|--------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Sand City | 291 | 318 | 342 | 382 | 458 | 672 | 899 | 1,064 | 746 | 235% |
| % change | | 9.3% | 7.5% | 11.7% | 19.9% | 46.7% | 33.8% | 18.4% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|-----------|-----------|-----------|-----------|-----------|-----------|------------|------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Sand City | 43 | 43 | 43 | 48 | 58 | 84 | 113 | 134 | 91 | 212% |
| % change | | 0.0% | 0.0% | 11.6% | 20.8% | 44.8% | 34.5% | 18.6% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Sand City | 145 | 176 | 189 | 198 | 228 | 333 | 446 | 526 | 350 | 199% |
| % change | | 21.4% | 7.4% | 4.8% | 15.2% | 46.1% | 33.9% | 17.9% | | |

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Final 2022 Regional Growth Forecast

Sand City

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Sand City | 128 | 136 | 144 | 161 | 193 | 283 | 379 | 448 | 312 | 229% |
| % change | | 6.3% | 5.9% | 11.8% | 19.9% | 46.6% | 33.9% | 18.2% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Sand City | 11.7% | 22.7% | 23.8% | 18.7% | 15.4% | 15.0% | 15.0% | 14.8% | -7.9 | -35% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Sand City | 2.27 | 2.34 | 2.38 | 2.37 | 2.37 | 2.37 | 2.37 | 2.38 | 0.04 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Sand City | | | | | | | | | | |
| Agriculture (field work) | n/a | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | -- |
| Manufacturing | n/a | 201 | 225 | 226 | 227 | 227 | 227 | 227 | 26 | 13% |
| Site-based Skilled Trade | n/a | 393 | 442 | 446 | 458 | 468 | 478 | 488 | 95 | 24% |
| Wholesale | n/a | 203 | 221 | 217 | 220 | 220 | 220 | 220 | 17 | 8% |
| Retail | n/a | 582 | 566 | 568 | 572 | 577 | 582 | 587 | 5 | 1% |
| Financial & Prof. Serv. | n/a | 106 | 110 | 112 | 119 | 126 | 133 | 140 | 34 | 32% |
| Education | n/a | 16 | 18 | 18 | 20 | 21 | 22 | 23 | 7 | 44% |
| Health Care & Social Assist | n/a | 52 | 56 | 57 | 57 | 58 | 59 | 60 | 8 | 15% |
| Other Services | n/a | 346 | 383 | 386 | 400 | 413 | 423 | 433 | 87 | 25% |
| Public | n/a | 41 | 45 | 45 | 50 | 50 | 51 | 52 | 11 | 27% |
| Self-employed | n/a | 26 | 26 | 27 | 28 | 28 | 29 | 29 | 3 | 12% |
| Sand City | n/a | 1,966 | 2,092 | 2,102 | 2,151 | 2,188 | 2,224 | 2,259 | 293 | 15% |
| % change | | | 6.4% | 0.5% | 2.3% | 1.7% | 1.6% | 1.6% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

San Juan Bautista

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|--------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| San Juan Bautista | 1,862 | 1,945 | 2,112 | 2,269 | 2,315 | 2,374 | 2,410 | 2,436 | 491 | 25% |
| % change | | 4.5% | 8.6% | 7.4% | 2.0% | 2.5% | 1.5% | 1.1% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|--------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| San Juan Bautista | 1,857 | 1,940 | 2,107 | 2,264 | 2,310 | 2,369 | 2,405 | 2,431 | 491 | 25% |
| % change | | 4.5% | 8.6% | 7.5% | 2.0% | 2.6% | 1.5% | 1.1% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| San Juan Bautista | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 0 | 0% |
| % change | | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|--------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| San Juan Bautista | 745 | 750 | 819 | 878 | 918 | 951 | 965 | 975 | 225 | 30% |
| % change | | 0.7% | 9.2% | 7.2% | 4.6% | 3.6% | 1.5% | 1.0% | | |

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Final 2022 Regional Growth Forecast

San Juan Bautista

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|--------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| San Juan Bautista | 681 | 699 | 779 | 835 | 870 | 900 | 913 | 922 | 223 | 32% |
| % change | | 2.6% | 11.4% | 7.2% | 4.2% | 3.4% | 1.4% | 1.0% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|--------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| San Juan Bautista | 8.6% | 6.8% | 4.9% | 4.9% | 5.2% | 5.4% | 5.4% | 5.4% | -1.4 | -20% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|--------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| San Juan Bautista | 2.73 | 2.78 | 2.70 | 2.71 | 2.66 | 2.63 | 2.63 | 2.64 | -0.14 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| San Juan Bautista | | | | | | | | | | |
| Agriculture (field work) | n/a | 38 | 42 | 42 | 42 | 42 | 42 | 42 | 4 | 11% |
| Manufacturing | n/a | 14 | 16 | 16 | 16 | 16 | 16 | 16 | 2 | 14% |
| Site-based Skilled Trade | n/a | 23 | 26 | 26 | 26 | 26 | 26 | 26 | 3 | 13% |
| Wholesale | n/a | 6 | 7 | 7 | 7 | 8 | 10 | 10 | 4 | 67% |
| Retail | n/a | 38 | 37 | 37 | 37 | 38 | 43 | 46 | 8 | 21% |
| Financial & Prof. Serv. | n/a | 64 | 66 | 66 | 66 | 66 | 67 | 67 | 3 | 5% |
| Education | n/a | 60 | 66 | 66 | 66 | 66 | 67 | 67 | 7 | 12% |
| Health Care & Social Assist | n/a | 13 | 14 | 24 | 29 | 29 | 29 | 29 | 16 | 123% |
| Other Services | n/a | 195 | 216 | 217 | 222 | 227 | 232 | 237 | 42 | 22% |
| Public | n/a | 29 | 32 | 32 | 32 | 32 | 32 | 32 | 3 | 10% |
| Self-employed | n/a | 35 | 35 | 36 | 37 | 38 | 39 | 40 | 5 | 14% |
| San Juan Bautista | n/a | 515 | 557 | 569 | 580 | 588 | 603 | 612 | 97 | 19% |
| % change | | | 8.2% | 2.2% | 1.9% | 1.4% | 2.6% | 1.5% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

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Final 2022 Regional Growth Forecast

Santa Cruz

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Santa Cruz (Total) | 59,946 | 64,223 | 64,424 | 68,845 | 72,218 | 75,257 | 78,828 | 79,534 | 15,311 | 24% |
| % change | | 7.1% | 0.3% | 6.9% | 4.9% | 4.2% | 4.7% | 0.9% | | |
| <i>Santa Cruz balance</i> | 43,614 | 46,947 | 45,324 | 47,845 | 49,118 | 49,957 | 50,828 | 51,534 | 4,587 | 10% |
| <i>UCSC</i> | 16,332 | 17,276 | 19,100 | 21,000 | 23,100 | 25,300 | 28,000 | 28,000 | 10,724 | 62% |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Santa Cruz (Total) | 51,657 | 53,432 | 53,299 | 55,335 | 56,552 | 57,374 | 58,192 | 58,877 | 5,445 | 10% |
| % change | | 3.4% | -0.2% | 3.8% | 2.2% | 1.5% | 1.4% | 1.2% | | |
| <i>Santa Cruz balance</i> | 41,829 | 45,190 | 43,949 | 45,985 | 47,202 | 48,024 | 48,842 | 49,527 | 4,337 | 10% |
| <i>UCSC</i> | 9,828 | 8,242 | 9,350 | 9,350 | 9,350 | 9,350 | 9,350 | 9,350 | 1,108 | 13% |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Santa Cruz (Total) | 8,289 | 10,791 | 11,125 | 13,510 | 15,666 | 17,883 | 20,636 | 20,657 | 9,866 | 91% |
| % change | | 30.2% | 3.1% | 21.4% | 16.0% | 14.2% | 15.4% | 0.1% | | |
| <i>Santa Cruz balance</i> | 1,785 | 1,757 | 1,375 | 1,860 | 1,916 | 1,933 | 1,986 | 2,007 | 250 | 14% |
| <i>UCSC</i> | 6,504 | 9,034 | 9,750 | 11,650 | 13,750 | 15,950 | 18,650 | 18,650 | 9,616 | 106% |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Santa Cruz (Total) | 23,316 | 23,535 | 23,954 | 24,988 | 25,578 | 25,974 | 26,295 | 26,525 | 2,990 | 13% |
| % change | | 0.9% | 1.8% | 4.3% | 2.4% | 1.5% | 1.2% | 0.9% | | |
| <i>Santa Cruz balance</i> | 23,316 | 23,005 | 23,424 | 24,422 | 24,970 | 25,342 | 25,663 | 25,892 | 2,887 | 13% |
| <i>UCSC</i> | 0 | 530 | 530 | 566 | 608 | 632 | 632 | 633 | 103 | 19% |

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Final 2022 Regional Growth Forecast

Santa Cruz

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Santa Cruz (Total) | 21,657 | 22,039 | 22,608 | 23,552 | 24,084 | 24,422 | 24,706 | 24,923 | 2,884 | 13% |
| % change | | 1.8% | 2.6% | 4.2% | 2.3% | 1.4% | 1.2% | 0.9% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|-------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Santa Cruz | 7.1% | 6.4% | 5.6% | 5.7% | 5.8% | 6.0% | 6.0% | 6.0% | -0.3 | -5% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Santa Cruz | 2.39 | 2.42 | 2.36 | 2.35 | 2.35 | 2.35 | 2.36 | 2.36 | -0.06 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Santa Cruz | | | | | | | | | | |
| Agriculture (field work) | n/a | 121 | 126 | 126 | 126 | 126 | 126 | 126 | 5 | 4% |
| Manufacturing | n/a | 2,367 | 2,647 | 2,657 | 2,667 | 2,680 | 2,694 | 2,708 | 341 | 14% |
| Site-based Skilled Trade | n/a | 2,235 | 2,515 | 2,570 | 2,685 | 2,780 | 2,889 | 3,002 | 767 | 34% |
| Wholesale | n/a | 1,197 | 1,304 | 1,286 | 1,316 | 1,344 | 1,365 | 1,390 | 193 | 16% |
| Retail | n/a | 5,314 | 5,169 | 5,184 | 5,224 | 5,284 | 5,334 | 5,394 | 80 | 2% |
| Financial & Prof. Serv. | n/a | 4,305 | 4,443 | 4,478 | 4,673 | 4,864 | 5,054 | 5,254 | 949 | 22% |
| Education | n/a | 6,183 | 6,810 | 6,863 | 7,058 | 7,256 | 7,484 | 7,742 | 1,559 | 25% |
| Health Care & Social Assist | n/a | 3,844 | 4,173 | 4,309 | 4,475 | 4,643 | 4,819 | 5,002 | 1,158 | 30% |
| Other Services | n/a | 7,541 | 8,350 | 8,423 | 8,803 | 9,183 | 9,568 | 9,957 | 2,416 | 32% |
| Public | n/a | 5,691 | 6,271 | 6,302 | 6,395 | 6,485 | 6,604 | 6,746 | 1,055 | 19% |
| Self-employed | n/a | 2,042 | 2,057 | 2,119 | 2,172 | 2,218 | 2,266 | 2,315 | 273 | 13% |
| Santa Cruz Total | n/a | 40,840 | 43,865 | 44,317 | 45,594 | 46,863 | 48,203 | 49,636 | 8,796 | 22% |
| % change | | | 7.4% | 1.0% | 2.9% | 2.8% | 2.9% | 3.0% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Scotts Valley

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Scotts Valley | 11,580 | 11,946 | 11,693 | 11,718 | 11,837 | 11,867 | 11,868 | 12,010 | 64 | 1% |
| % change | | 3.2% | -2.1% | 0.2% | 1.0% | 0.3% | 0.0% | 1.2% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Scotts Valley | 11,308 | 11,674 | 11,421 | 11,446 | 11,562 | 11,592 | 11,591 | 11,731 | 57 | 0% |
| % change | | 3.2% | -2.2% | 0.2% | 1.0% | 0.3% | 0.0% | 1.2% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Scotts Valley | 272 | 272 | 272 | 272 | 275 | 275 | 277 | 279 | 7 | 3% |
| % change | | 0.0% | 0.0% | 0.0% | 1.1% | 0.0% | 0.7% | 0.7% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Scotts Valley | 4,610 | 4,691 | 4,739 | 4,798 | 4,846 | 4,869 | 4,887 | 4,930 | 239 | 5% |
| % change | | 1.8% | 1.0% | 1.2% | 1.0% | 0.5% | 0.4% | 0.9% | | |

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Final 2022 Regional Growth Forecast

Scotts Valley

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Scotts Valley | 4,426 | 4,494 | 4,522 | 4,577 | 4,623 | 4,635 | 4,650 | 4,691 | 197 | 4% |
| % change | | 1.5% | 0.6% | 1.2% | 1.0% | 0.3% | 0.3% | 0.9% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Scotts Valley | 4.0% | 4.2% | 4.6% | 4.6% | 4.6% | 4.8% | 4.8% | 4.8% | 0.6 | 15% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Scotts Valley | 2.55 | 2.60 | 2.53 | 2.50 | 2.50 | 2.50 | 2.49 | 2.50 | -0.10 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Scotts Valley | n/a | 9,458 | 10,109 | 10,185 | 10,345 | 10,489 | 10,637 | 10,797 | 1,339 | 14% |
| % change | | | 6.9% | 0.8% | 1.6% | 1.4% | 1.4% | 1.5% | | |
| Agriculture (field work) | n/a | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 0 | 0% |
| Manufacturing | n/a | 1,903 | 2,126 | 2,134 | 2,146 | 2,156 | 2,166 | 2,176 | 273 | 14% |
| Site-based Skilled Trade | n/a | 522 | 587 | 598 | 613 | 623 | 637 | 652 | 130 | 25% |
| Wholesale | n/a | 675 | 735 | 724 | 733 | 738 | 743 | 748 | 73 | 11% |
| Retail | n/a | 1,523 | 1,481 | 1,485 | 1,495 | 1,510 | 1,525 | 1,543 | 20 | 1% |
| Financial & Prof. Serv. | n/a | 1,583 | 1,634 | 1,647 | 1,679 | 1,714 | 1,749 | 1,783 | 200 | 13% |
| Education | n/a | 384 | 423 | 426 | 436 | 446 | 456 | 471 | 87 | 23% |
| Health Care & Social Assist | n/a | 530 | 576 | 596 | 612 | 627 | 642 | 661 | 131 | 25% |
| Other Services | n/a | 1,720 | 1,904 | 1,919 | 1,960 | 1,990 | 2,020 | 2,050 | 330 | 19% |
| Public | n/a | 224 | 246 | 247 | 252 | 257 | 262 | 267 | 43 | 19% |
| Self-employed | n/a | 389 | 392 | 404 | 414 | 423 | 432 | 441 | 52 | 13% |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Seaside

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Seaside (Total) | 33,025 | 33,815 | 33,537 | 34,497 | 35,107 | 35,634 | 36,582 | 38,316 | 4,501 | 13% |
| % change | | 2.4% | -0.8% | 2.9% | 1.8% | 1.5% | 2.7% | 4.7% | | |
| Seaside balance | 26,836 | 25,835 | 26,345 | 27,285 | 27,850 | 28,317 | 29,205 | 30,881 | 5,046 | 20% |
| Fort Ord | 4,473 | 4,163 | 3,083 | 3,083 | 3,083 | 3,083 | 3,083 | 3,083 | -1,080 | -26% |
| CSUMB | 1,716 | 3,817 | 4,109 | 4,129 | 4,174 | 4,234 | 4,294 | 4,352 | 535 | 14% |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Seaside (Total) | 31,898 | 32,505 | 31,854 | 32,814 | 33,405 | 33,907 | 34,827 | 36,531 | 4,026 | 12% |
| % change | | 1.9% | -2.0% | 3.0% | 1.8% | 1.5% | 2.7% | 4.9% | | |
| Seaside balance | 26,685 | 25,684 | 26,192 | 27,130 | 27,692 | 28,157 | 29,039 | 30,706 | 5,022 | 20% |
| Fort Ord | 4,473 | 4,163 | 3,083 | 3,083 | 3,083 | 3,083 | 3,083 | 3,083 | -1,080 | -26% |
| CSUMB | 740 | 2,658 | 2,579 | 2,601 | 2,630 | 2,667 | 2,705 | 2,742 | 84 | 3% |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Seaside (Total) | 1,127 | 1,310 | 1,683 | 1,683 | 1,702 | 1,727 | 1,755 | 1,785 | 475 | 36% |
| % change | | 16.2% | 28.5% | 0.0% | 1.1% | 1.5% | 1.6% | 1.7% | | |
| Seaside balance | 151 | 151 | 153 | 155 | 158 | 160 | 166 | 175 | 24 | 16% |
| Fort Ord | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | -- |
| CSUMB | 976 | 1,159 | 1,530 | 1,528 | 1,544 | 1,567 | 1,589 | 1,610 | 451 | 39% |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Seaside (Total) | 10,872 | 10,913 | 10,920 | 11,437 | 11,925 | 12,248 | 12,604 | 13,192 | 2,279 | 21% |
| % change | | 0.4% | 0.1% | 4.7% | 4.3% | 2.7% | 2.9% | 4.7% | | |
| Seaside balance | 9,507 | 8,908 | 8,942 | 9,429 | 9,888 | 10,190 | 10,531 | 11,107 | 2,199 | 25% |
| Fort Ord | 1,119 | 1,119 | 1,119 | 1,119 | 1,119 | 1,119 | 1,119 | 1,119 | 0 | 0% |
| CSUMB | 246 | 886 | 859 | 889 | 918 | 939 | 954 | 966 | 80 | 9% |

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Final 2022 Regional Growth Forecast

Seaside

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|------------------------|---------------|---------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Seaside (Total) | 10,093 | 10,023 | 9,870 | 10,323 | 10,723 | 10,979 | 11,289 | 11,826 | 1,803 | 18% |
| % change | | -0.7% | -1.5% | 4.6% | 3.9% | 2.4% | 2.8% | 4.8% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|----------------|-------------|-------------|-------------|-------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Seaside | 7.2% | 8.2% | 9.6% | 9.7% | 10.1% | 10.4% | 10.4% | 10.4% | 2.2 | 27% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Seaside | 3.16 | 3.24 | 3.23 | 3.18 | 3.12 | 3.09 | 3.09 | 3.09 | -0.15 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Seaside | | | | | | | | | | |
| Agriculture (field work) | n/a | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | -- |
| Manufacturing | n/a | 105 | 117 | 117 | 117 | 117 | 117 | 117 | 12 | 11% |
| Site-based Skilled Trade | n/a | 599 | 674 | 690 | 709 | 722 | 739 | 756 | 157 | 26% |
| Wholesale | n/a | 169 | 184 | 180 | 181 | 181 | 181 | 181 | 12 | 7% |
| Retail | n/a | 1,835 | 1,785 | 1,790 | 1,804 | 1,824 | 1,844 | 1,864 | 29 | 2% |
| Financial & Prof. Serv. | n/a | 403 | 415 | 417 | 434 | 455 | 475 | 494 | 91 | 23% |
| Education | n/a | 1,054 | 1,166 | 1,173 | 1,197 | 1,221 | 1,244 | 1,269 | 215 | 20% |
| Health Care & Social Assist | n/a | 815 | 896 | 927 | 952 | 977 | 1,002 | 1,030 | 215 | 26% |
| Other Services | n/a | 1,822 | 2,017 | 2,037 | 2,105 | 2,170 | 2,235 | 2,303 | 481 | 26% |
| Public | n/a | 2,358 | 2,711 | 2,732 | 2,795 | 2,844 | 2,890 | 2,954 | 596 | 25% |
| Self-employed | n/a | 507 | 511 | 526 | 539 | 551 | 563 | 575 | 68 | 13% |
| Seaside Total | n/a | 9,667 | 10,476 | 10,589 | 10,833 | 11,062 | 11,290 | 11,543 | 1,876 | 19% |
| % change | | | 8.4% | 1.1% | 2.3% | 2.1% | 2.1% | 2.2% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

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Final 2022 Regional Growth Forecast

Soledad

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Soledad (Total) | 25,738 | 24,597 | 25,301 | 26,112 | 26,824 | 27,697 | 28,419 | 29,133 | 4,536 | 18% |
| % change | | -4.4% | 2.9% | 3.2% | 2.7% | 3.3% | 2.6% | 2.5% | | |
| <i>Soledad balance</i> | <i>15,690</i> | <i>16,298</i> | <i>17,190</i> | <i>18,001</i> | <i>18,713</i> | <i>19,586</i> | <i>20,308</i> | <i>21,022</i> | <i>4,724</i> | <i>29%</i> |
| <i>SVSP & CTF</i> | <i>10,048</i> | <i>8,299</i> | <i>8,111</i> | <i>8,111</i> | <i>8,111</i> | <i>8,111</i> | <i>8,111</i> | <i>8,111</i> | <i>-188</i> | <i>-2%</i> |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Soledad (Total) | 15,635 | 16,243 | 17,135 | 17,944 | 18,653 | 19,524 | 20,243 | 20,955 | 4,712 | 29% |
| % change | | 3.9% | 5.5% | 4.7% | 4.0% | 4.7% | 3.7% | 3.5% | | |
| <i>Soledad balance</i> | <i>15,635</i> | <i>16,243</i> | <i>17,135</i> | <i>17,944</i> | <i>18,653</i> | <i>19,524</i> | <i>20,243</i> | <i>20,955</i> | <i>4,712</i> | <i>29%</i> |
| <i>SVSP & CTF</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>--</i> |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|---------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Soledad (Total) | 10,103 | 8,354 | 8,166 | 8,168 | 8,171 | 8,173 | 8,176 | 8,178 | -176 | -2% |
| % change | | -17.3% | -2.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | |
| <i>Soledad balance</i> | <i>55</i> | <i>55</i> | <i>55</i> | <i>57</i> | <i>60</i> | <i>62</i> | <i>65</i> | <i>67</i> | <i>12</i> | <i>22%</i> |
| <i>SVSP & CTF</i> | <i>10,048</i> | <i>8,299</i> | <i>8,111</i> | <i>8,111</i> | <i>8,111</i> | <i>8,111</i> | <i>8,111</i> | <i>8,111</i> | <i>-188</i> | <i>-2%</i> |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Soledad (Total) | 3,876 | 3,927 | 4,137 | 4,433 | 4,733 | 5,024 | 5,240 | 5,426 | 1,499 | 38% |
| % change | | 1.3% | 5.3% | 7.2% | 6.8% | 6.1% | 4.3% | 3.5% | | |
| <i>Soledad balance</i> | <i>3,876</i> | <i>3,927</i> | <i>4,137</i> | <i>4,433</i> | <i>4,733</i> | <i>5,024</i> | <i>5,240</i> | <i>5,426</i> | <i>1,499</i> | <i>38%</i> |
| <i>SVSP & CTF</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>--</i> |

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Final 2022 Regional Growth Forecast

Soledad

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Soledad (Total) | 3,664 | 3,668 | 3,820 | 4,085 | 4,360 | 4,628 | 4,825 | 4,997 | 1,329 | 36% |
| % change | | 0.1% | 4.1% | 6.9% | 6.7% | 6.1% | 4.3% | 3.6% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Soledad | 5.5% | 6.6% | 7.7% | 7.9% | 7.9% | 7.9% | 7.9% | 7.9% | 1.3 | 20% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Soledad | 4.27 | 4.43 | 4.49 | 4.39 | 4.28 | 4.22 | 4.20 | 4.19 | -0.23 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Soledad | | | | | | | | | | |
| Agriculture (field work) | n/a | 1,729 | 1,833 | 1,834 | 1,836 | 1,838 | 1,841 | 1,843 | 114 | 7% |
| Manufacturing | n/a | 293 | 315 | 316 | 317 | 317 | 317 | 317 | 24 | 8% |
| Site-based Skilled Trade | n/a | 1,638 | 1,833 | 1,868 | 1,899 | 1,916 | 1,943 | 1,972 | 334 | 20% |
| Wholesale | n/a | 219 | 239 | 235 | 239 | 239 | 239 | 239 | 20 | 9% |
| Retail | n/a | 297 | 289 | 290 | 291 | 296 | 301 | 306 | 9 | 3% |
| Financial & Prof. Serv. | n/a | 183 | 189 | 190 | 194 | 198 | 202 | 206 | 23 | 13% |
| Education | n/a | 517 | 569 | 573 | 581 | 590 | 600 | 610 | 93 | 18% |
| Health Care & Social Assist | n/a | 584 | 622 | 642 | 655 | 669 | 683 | 698 | 114 | 20% |
| Other Services | n/a | 433 | 479 | 482 | 491 | 500 | 508 | 518 | 85 | 20% |
| Public | n/a | 2,498 | 2,500 | 2,503 | 2,509 | 2,519 | 2,544 | 2,593 | 95 | 4% |
| Self-employed | n/a | 141 | 142 | 146 | 149 | 153 | 155 | 160 | 19 | 13% |
| Soledad Total | n/a | 8,532 | 9,010 | 9,079 | 9,161 | 9,235 | 9,333 | 9,462 | 930 | 11% |
| % change | | | 5.6% | 0.8% | 0.9% | 0.8% | 1.1% | 1.4% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Unincorporated Monterey

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Unincorporated Monterey (' | 100,213 | 104,009 | 106,744 | 108,432 | 109,976 | 110,170 | 110,277 | 110,326 | 6,317 | 6% |
| % change | | 3.8% | 2.6% | 1.6% | 1.4% | 0.2% | 0.1% | 0.0% | | |
| <i>Unincorporated Monterey balance</i> | <i>97,672</i> | <i>101,468</i> | <i>104,203</i> | <i>105,891</i> | <i>107,435</i> | <i>107,629</i> | <i>107,736</i> | <i>107,785</i> | <i>6,317</i> | <i>6%</i> |
| <i>CSUMB</i> | <i>2,541</i> | <i>2,541</i> | <i>2,541</i> | <i>2,541</i> | <i>2,541</i> | <i>2,541</i> | <i>2,541</i> | <i>2,541</i> | <i>0</i> | <i>0%</i> |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|--|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Unincorporated Monterey (' | 96,551 | 100,347 | 103,082 | 104,865 | 106,413 | 107,446 | 108,589 | 109,070 | 8,723 | 9% |
| % change | | 3.9% | 2.7% | 1.7% | 1.5% | 1.0% | 1.1% | 0.4% | | |
| <i>Unincorporated Monterey balance</i> | <i>96,551</i> | <i>100,347</i> | <i>103,082</i> | <i>104,763</i> | <i>106,286</i> | <i>106,480</i> | <i>106,582</i> | <i>106,631</i> | <i>6,284</i> | <i>6%</i> |
| <i>CSUMB</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>102</i> | <i>127</i> | <i>966</i> | <i>2,007</i> | <i>2,439</i> | <i>2,439</i> | <i>--</i> |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|--|--------------|--------------|--------------|--------------|--------------|---------------|---------------|---------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Unincorporated Monterey (' | 3,662 | 3,662 | 3,662 | 3,567 | 3,563 | 2,724 | 1,688 | 1,256 | -2,406 | -66% |
| % change | | 0.0% | 0.0% | -2.6% | -0.1% | -23.5% | -38.0% | -25.6% | | |
| <i>Unincorporated Monterey balance</i> | <i>1,121</i> | <i>1,121</i> | <i>1,121</i> | <i>1,128</i> | <i>1,149</i> | <i>1,149</i> | <i>1,154</i> | <i>1,154</i> | <i>33</i> | <i>3%</i> |
| <i>CSUMB</i> | <i>2,541</i> | <i>2,541</i> | <i>2,541</i> | <i>2,439</i> | <i>2,414</i> | <i>1,575</i> | <i>534</i> | <i>102</i> | <i>-2,439</i> | <i>-96%</i> |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Unincorporated Monterey (' | 38,296 | 38,783 | 39,839 | 40,271 | 40,620 | 40,908 | 41,271 | 41,408 | 2,625 | 7% |
| % change | | 1.3% | 2.7% | 1.1% | 0.9% | 0.7% | 0.9% | 0.3% | | |
| <i>Unincorporated Monterey balance</i> | <i>38,296</i> | <i>38,783</i> | <i>39,839</i> | <i>40,238</i> | <i>40,569</i> | <i>40,592</i> | <i>40,616</i> | <i>40,616</i> | <i>1,833</i> | <i>5%</i> |
| <i>CSUMB</i> | <i>0</i> | <i>0</i> | <i>0</i> | <i>33</i> | <i>51</i> | <i>316</i> | <i>655</i> | <i>792</i> | <i>792</i> | <i>--</i> |

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Final 2022 Regional Growth Forecast

Unincorporated Monterey

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|--------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Unincorporated Monterey | 33,408 | 33,435 | 33,922 | 34,491 | 34,904 | 35,246 | 35,616 | 35,777 | 2,342 | 7% |
| % change | | 0.1% | 1.5% | 1.7% | 1.2% | 1.0% | 1.0% | 0.5% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|--------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Unincorporated Monterey | 12.8% | 13.8% | 14.9% | 14.4% | 14.1% | 13.8% | 13.7% | 13.6% | -0.2 | -1% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|--------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Unincorporated Monterey | 2.89 | 3.00 | 3.04 | 3.04 | 3.05 | 3.05 | 3.05 | 3.05 | 0.05 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|--------------------------------|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Unincorporated Monterey | | | | | | | | | | |
| Agriculture (field work) | n/a | 10,802 | 11,853 | 11,860 | 11,899 | 11,938 | 11,977 | 12,018 | 1,216 | 11% |
| Manufacturing | n/a | 2,227 | 2,488 | 2,495 | 2,510 | 2,525 | 2,540 | 2,555 | 328 | 15% |
| Site-based Skilled Trade | n/a | 6,850 | 7,709 | 7,827 | 7,976 | 8,065 | 8,191 | 8,325 | 1,475 | 22% |
| Wholesale | n/a | 7,978 | 8,691 | 8,525 | 8,578 | 8,606 | 8,635 | 8,665 | 687 | 9% |
| Retail | n/a | 4,979 | 4,843 | 4,851 | 4,884 | 4,932 | 4,987 | 5,043 | 64 | 1% |
| Financial & Prof. Serv. | n/a | 4,390 | 4,530 | 4,566 | 4,695 | 4,834 | 4,977 | 5,120 | 730 | 17% |
| Education | n/a | 2,843 | 3,131 | 3,151 | 3,222 | 3,292 | 3,374 | 3,469 | 626 | 22% |
| Health Care & Social Assist | n/a | 2,345 | 2,546 | 2,627 | 2,697 | 2,770 | 2,844 | 2,923 | 578 | 25% |
| Other Services | n/a | 9,374 | 10,380 | 10,462 | 10,791 | 11,096 | 11,402 | 11,712 | 2,338 | 25% |
| Public | n/a | 1,295 | 1,423 | 1,430 | 1,451 | 1,471 | 1,497 | 1,528 | 233 | 18% |
| Self-employed | n/a | 2,679 | 2,699 | 2,780 | 2,850 | 2,910 | 2,972 | 3,037 | 358 | 13% |
| Unincorporated Monterey | n/a | 55,762 | 60,293 | 60,574 | 61,553 | 62,439 | 63,396 | 64,395 | 8,633 | 15% |
| % change | | | 8.1% | 0.5% | 1.6% | 1.4% | 1.5% | 1.6% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

November 11, 2020

Final 2022 Regional Growth Forecast

Unincorporated San Benito

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Unincorporated San Benito | 18,479 | 18,879 | 19,595 | 24,451 | 28,136 | 30,843 | 33,033 | 35,331 | 16,452 | 87% |
| % change | | 2.2% | 3.8% | 24.8% | 15.1% | 9.6% | 7.1% | 7.0% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Unincorporated San Benito | 18,310 | 18,710 | 19,400 | 24,237 | 27,912 | 30,610 | 32,793 | 35,086 | 16,376 | 88% |
| % change | | 2.2% | 3.7% | 24.9% | 15.2% | 9.7% | 7.1% | 7.0% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Unincorporated San Benito | 169 | 169 | 195 | 214 | 224 | 233 | 240 | 245 | 76 | 45% |
| % change | | 0.0% | 15.4% | 9.7% | 4.7% | 4.0% | 3.0% | 2.1% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Unincorporated San Benito | 6,724 | 6,755 | 7,177 | 8,342 | 9,238 | 10,121 | 10,433 | 10,678 | 3,923 | 58% |
| % change | | 0.5% | 6.2% | 16.2% | 10.7% | 9.6% | 3.1% | 2.3% | | |

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Final 2022 Regional Growth Forecast

Unincorporated San Benito

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Unincorporated San Benito | 6,264 | 6,299 | 6,695 | 7,909 | 8,799 | 9,665 | 9,997 | 10,216 | 3,917 | 62% |
| % change | | 0.6% | 6.3% | 18.1% | 11.3% | 9.8% | 3.4% | 2.2% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Unincorporated San Benito | 6.8% | 6.8% | 6.7% | 5.2% | 4.8% | 4.5% | 4.2% | 4.3% | -2.4 | -36% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Unincorporated San Benito | 2.92 | 2.97 | 2.90 | 3.06 | 3.17 | 3.17 | 3.28 | 3.43 | 0.46 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Unincorporated San Benito | | | | | | | | | | |
| Agriculture (field work) | n/a | 1,405 | 1,539 | 1,540 | 1,545 | 1,550 | 1,555 | 1,560 | 155 | 11% |
| Manufacturing | n/a | 895 | 990 | 994 | 1,001 | 1,007 | 1,013 | 1,019 | 124 | 14% |
| Site-based Skilled Trade | n/a | 830 | 934 | 955 | 979 | 995 | 1,022 | 1,049 | 219 | 26% |
| Wholesale | n/a | 593 | 644 | 633 | 640 | 645 | 650 | 655 | 62 | 10% |
| Retail | n/a | 279 | 271 | 273 | 275 | 280 | 285 | 292 | 13 | 5% |
| Financial & Prof. Serv. | n/a | 1,450 | 1,496 | 1,509 | 1,551 | 1,596 | 1,641 | 1,686 | 236 | 16% |
| Education | n/a | 215 | 237 | 249 | 257 | 264 | 275 | 285 | 70 | 33% |
| Health Care & Social Assist | n/a | 98 | 109 | 114 | 119 | 129 | 142 | 157 | 59 | 60% |
| Other Services | n/a | 452 | 500 | 503 | 523 | 543 | 578 | 591 | 139 | 31% |
| Public | n/a | 210 | 231 | 234 | 248 | 267 | 301 | 311 | 101 | 48% |
| Self-employed | n/a | 261 | 263 | 271 | 278 | 283 | 289 | 296 | 35 | 13% |
| Unincorporated San Benito | n/a | 6,688 | 7,214 | 7,275 | 7,416 | 7,559 | 7,751 | 7,901 | 1,213 | 18% |
| % change | | | 7.9% | 0.8% | 1.9% | 1.9% | 2.5% | 1.9% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Unincorporated Santa Cruz

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Unincorporated Santa Cruz | 129,739 | 134,990 | 133,493 | 134,675 | 135,027 | 135,304 | 135,625 | 135,953 | 963 | 1% |
| % change | | 4.0% | -1.1% | 0.9% | 0.3% | 0.2% | 0.2% | 0.2% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Unincorporated Santa Cruz | 128,007 | 133,153 | 131,669 | 132,836 | 133,175 | 133,452 | 133,764 | 134,089 | 936 | 1% |
| % change | | 4.0% | -1.1% | 0.9% | 0.3% | 0.2% | 0.2% | 0.2% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Unincorporated Santa Cruz | 1,732 | 1,837 | 1,824 | 1,839 | 1,852 | 1,852 | 1,861 | 1,864 | 27 | 1% |
| % change | | 6.1% | -0.7% | 0.8% | 0.7% | 0.0% | 0.5% | 0.2% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Unincorporated Santa Cruz | 56,927 | 57,327 | 57,662 | 58,807 | 59,178 | 59,519 | 59,697 | 59,806 | 2,479 | 4% |
| % change | | 0.7% | 0.6% | 2.0% | 0.6% | 0.6% | 0.3% | 0.2% | | |

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Final 2022 Regional Growth Forecast

Unincorporated Santa Cruz

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Unincorporated Santa Cruz | 50,118 | 51,288 | 52,156 | 53,141 | 53,330 | 53,494 | 53,619 | 53,723 | 2,435 | 5% |
| % change | | 2.3% | 1.7% | 1.9% | 0.4% | 0.3% | 0.2% | 0.2% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|--------------|--------------|-------------|-------------|-------------|--------------|--------------|--------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Unincorporated Santa Cruz | 12.0% | 10.5% | 9.5% | 9.6% | 9.9% | 10.1% | 10.2% | 10.2% | -0.4 | -3% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Unincorporated Santa Cruz | 2.55 | 2.60 | 2.52 | 2.50 | 2.50 | 2.49 | 2.49 | 2.50 | -0.10 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|----------------------------------|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Unincorporated Santa Cruz | | | | | | | | | | |
| Agriculture (field work) | n/a | 2,836 | 3,106 | 3,108 | 3,118 | 3,128 | 3,138 | 3,148 | 312 | 11% |
| Manufacturing | n/a | 2,393 | 2,674 | 2,684 | 2,700 | 2,715 | 2,730 | 2,745 | 352 | 15% |
| Site-based Skilled Trade | n/a | 2,926 | 3,293 | 3,353 | 3,412 | 3,446 | 3,496 | 3,549 | 623 | 21% |
| Wholesale | n/a | 3,876 | 4,222 | 4,155 | 4,196 | 4,231 | 4,271 | 4,311 | 435 | 11% |
| Retail | n/a | 3,164 | 3,078 | 3,087 | 3,110 | 3,145 | 3,180 | 3,215 | 51 | 2% |
| Financial & Prof. Serv. | n/a | 3,329 | 3,434 | 3,460 | 3,532 | 3,609 | 3,689 | 3,768 | 439 | 13% |
| Education | n/a | 3,165 | 3,486 | 3,504 | 3,556 | 3,607 | 3,673 | 3,748 | 583 | 18% |
| Health Care & Social Assist | n/a | 5,740 | 6,237 | 6,439 | 6,585 | 6,737 | 6,893 | 7,057 | 1,317 | 23% |
| Other Services | n/a | 8,403 | 9,305 | 9,379 | 9,653 | 9,893 | 10,137 | 10,382 | 1,979 | 24% |
| Public | n/a | 1,586 | 1,743 | 1,752 | 1,778 | 1,803 | 1,835 | 1,875 | 289 | 18% |
| Self-employed | n/a | 4,651 | 4,686 | 4,827 | 4,948 | 5,052 | 5,160 | 5,273 | 622 | 13% |
| Unincorporated Santa Cruz | n/a | 42,069 | 45,264 | 45,748 | 46,588 | 47,366 | 48,202 | 49,071 | 7,002 | 17% |
| % change | | | 7.6% | 1.1% | 1.8% | 1.7% | 1.8% | 1.8% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

Employment 2010 and 2015 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from 2022 Regional Growth Forecast, produced by AMBAG and PRB.

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Final 2022 Regional Growth Forecast

Watsonville

| POPULATION | | | | | | | | | Chg.2015-2045 | |
|--------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 732,708 | 762,241 | 774,729 | 800,726 | 824,992 | 842,189 | 857,828 | 869,776 | 107,535 | 14% |
| % change | | 4.0% | 1.6% | 3.4% | 3.0% | 2.1% | 1.9% | 1.4% | | |
| Watsonville | 51,199 | 52,410 | 51,515 | 52,918 | 54,270 | 55,138 | 55,786 | 56,344 | 3,934 | 8% |
| % change | | 2.4% | -1.7% | 2.7% | 2.6% | 1.6% | 1.2% | 1.0% | | |

| HOUSEHOLD POPULATION | | | | | | | | | Chg.2015-2045 | |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 700,207 | 728,352 | 740,321 | 763,380 | 784,511 | 799,310 | 811,954 | 822,824 | 94,472 | 13% |
| % change | | 4.0% | 1.6% | 3.1% | 2.8% | 1.9% | 1.6% | 1.3% | | |
| Watsonville | 50,671 | 51,882 | 50,987 | 52,382 | 53,718 | 54,582 | 55,218 | 55,772 | 3,890 | 7% |
| % change | | 2.4% | -1.7% | 2.7% | 2.6% | 1.6% | 1.2% | 1.0% | | |

| GROUP QUARTERS POPULATION | | | | | | | | | Chg.2015-2045 | |
|---------------------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 32,501 | 33,889 | 34,408 | 37,346 | 40,481 | 42,879 | 45,874 | 46,952 | 13,063 | 39% |
| % change | | 4.3% | 1.5% | 8.5% | 8.4% | 5.9% | 7.0% | 2.3% | | |
| Watsonville | 528 | 528 | 528 | 536 | 552 | 556 | 568 | 572 | 44 | 8% |
| % change | | 0.0% | 0.0% | 1.5% | 3.0% | 0.7% | 2.2% | 0.7% | | |

| HOUSING | | | | | | | | | Chg.2015-2045 | |
|--------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 260,256 | 262,660 | 267,812 | 277,645 | 288,386 | 296,352 | 301,307 | 304,900 | 42,240 | 16% |
| % change | | 0.9% | 2.0% | 3.7% | 3.9% | 2.8% | 1.7% | 1.2% | | |
| Watsonville | 14,089 | 14,131 | 14,226 | 14,829 | 15,629 | 16,108 | 16,347 | 16,519 | 2,388 | 17% |
| % change | | 0.3% | 0.7% | 4.2% | 5.4% | 3.1% | 1.5% | 1.1% | | |

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Final 2022 Regional Growth Forecast

Watsonville

| HOUSEHOLDS | | | | | | | | | Chg.2015-2045 | |
|--------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 236,059 | 238,862 | 243,863 | 253,106 | 262,493 | 269,175 | 273,462 | 276,730 | 37,868 | 16% |
| % change | | 1.2% | 2.1% | 3.8% | 3.7% | 2.5% | 1.6% | 1.2% | | |
| Watsonville | 13,528 | 13,627 | 13,772 | 14,289 | 14,971 | 15,350 | 15,538 | 15,686 | 2,059 | 15% |
| % change | | 0.7% | 1.1% | 3.8% | 4.8% | 2.5% | 1.2% | 1.0% | | |

| VACANCY RATE | | | | | | | | | Chg.2015-2045 | |
|--------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 9.3% | 9.1% | 8.9% | 8.8% | 9.0% | 9.2% | 9.2% | 9.2% | 0.2 | 2% |
| Watsonville | 4.0% | 3.6% | 3.2% | 3.6% | 4.2% | 4.7% | 4.9% | 5.0% | 1.5 | 41% |

| AVERAGE HOUSEHOLD SIZE | | | | | | | | | Chg.2015-2045 | |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 2.97 | 3.05 | 3.04 | 3.02 | 2.99 | 2.97 | 2.97 | 2.97 | -0.08 | 0% |
| Watsonville | 3.75 | 3.81 | 3.70 | 3.67 | 3.59 | 3.56 | 3.55 | 3.56 | -0.25 | 0% |

| JOBS | | | | | | | | | Chg.2015-2045 | |
|-----------------------------|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | Num. | % |
| AMBAG Region | 351,735 | 377,335 | 406,280 | 410,017 | 418,132 | 425,845 | 434,147 | 442,824 | 65,489 | 17% |
| % change | | 7.3% | 7.7% | 0.9% | 2.0% | 1.8% | 1.9% | 2.0% | | |
| Watsonville | | | | | | | | | | |
| Agriculture (field work) | n/a | 3,828 | 4,192 | 4,195 | 4,208 | 4,223 | 4,238 | 4,253 | 425 | 11% |
| Manufacturing | n/a | 1,492 | 1,667 | 1,673 | 1,682 | 1,692 | 1,702 | 1,712 | 220 | 15% |
| Site-based Skilled Trade | n/a | 4,310 | 4,850 | 4,943 | 5,042 | 5,105 | 5,192 | 5,283 | 973 | 23% |
| Wholesale | n/a | 2,638 | 2,874 | 2,830 | 2,865 | 2,891 | 2,916 | 2,941 | 303 | 11% |
| Retail | n/a | 3,149 | 3,063 | 3,072 | 3,095 | 3,130 | 3,165 | 3,198 | 49 | 2% |
| Financial & Prof. Serv. | n/a | 2,064 | 2,130 | 2,145 | 2,182 | 2,222 | 2,262 | 2,301 | 237 | 11% |
| Education | n/a | 1,532 | 1,687 | 1,695 | 1,716 | 1,736 | 1,765 | 1,800 | 268 | 17% |
| Health Care & Social Assist | n/a | 3,267 | 3,547 | 3,663 | 3,735 | 3,809 | 3,887 | 3,968 | 701 | 21% |
| Other Services | n/a | 2,578 | 2,855 | 2,878 | 2,935 | 2,975 | 3,015 | 3,055 | 477 | 19% |
| Public | n/a | 1,011 | 1,111 | 1,117 | 1,128 | 1,142 | 1,162 | 1,187 | 176 | 17% |
| Self-employed | n/a | 534 | 538 | 554 | 568 | 580 | 592 | 605 | 71 | 13% |
| Watsonville | n/a | 26,403 | 28,514 | 28,765 | 29,156 | 29,505 | 29,896 | 30,303 | 3,900 | 15% |
| % change | | | 8.0% | 0.9% | 1.4% | 1.2% | 1.3% | 1.4% | | |

Important Note: Independent rounding results in some cases in which parts do not sum to the total.

Data Sources:

Population and Housing 2010-2019 from California Department of Finance.

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