

Bay Area Population Trends

The Bay Area has gone from being the state's slowest growing region to becoming the growth leader after 2010. Until 2010 the San Joaquin Valley and Sacramento regions were the fastest growing while the two largest regions—the Los Angeles Basin and Bay Area had the slowest growth rate. After 2010 the Rest of State region that includes the other 29 counties had the slowest growth as population growth centered in metropolitan counties. All population estimates are from the state Department of Finance (DOF).

Fastest Growing Regions

	1975-1995		1995-2010		2010-2015
S.J. Valley	72.4%	Sacramento	31.4%	S.F. Bay Area	6.1%
Sacramento	70.7%	S.J. Valley	28.9%	San Diego	5.6%
San Diego	64.1%	Rest of State	20.9%	S.J. Valley	4.8%
Rest of State	53.2%	San Diego	18.6%	California	4.6%
California	47.2%	California	17.7%	Sacramento	4.6%
L.A. Basin	45.5%	L.A. Basin	16.7%	L.A. Basin	4.2%
S.F. Bay Area	29.6%	S.F. Bay Area	13.0%	Rest of State	1.8%

Source: DOF

Ten Fastest Growing Counties

	1975-1995		1995-2010		2010-2015
Riverside	158.0%	Placer	65.5%	Santa Clara	7.1%
Nevada	155.4%	Riverside	59.2%	Alameda	6.9%
Calaveras	147.4%	Madera	36.6%	San Francisco	6.7%
El Dorado	143.9%	Kern	36.0%	Riverside	6.2%
Placer	131.8%	San Joaquin	31.7%	Contra Costa	6.2%
San Bernardino	126.8%	Kings	31.2%	Placer	6.1%
Madera	125.7%	Yolo	30.9%	San Joaquin	5.9%
Amador	119.7%	San Bernardino	29.3%	San Mateo	5.9%
Lake	116.9%	Merced	29.0%	Imperial	5.7%
San Benito	107.2%	Imperial	28.3%	San Diego	5.6%

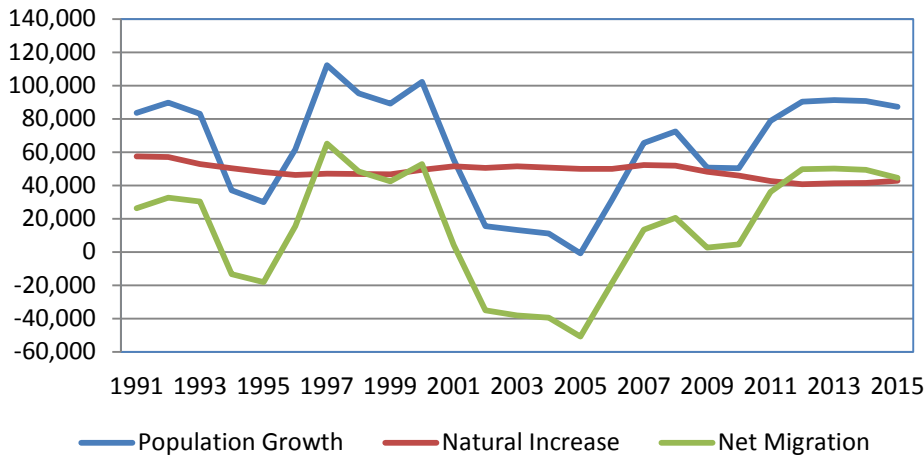
Source: DOF

A similar pattern was true at the county level. Between 2010 and 2015 five of the ten fastest growing counties were in the Bay Area including the top three—Santa Clara, Alameda and San Francisco. Previously no Bay Area county was ranked in the top ten.

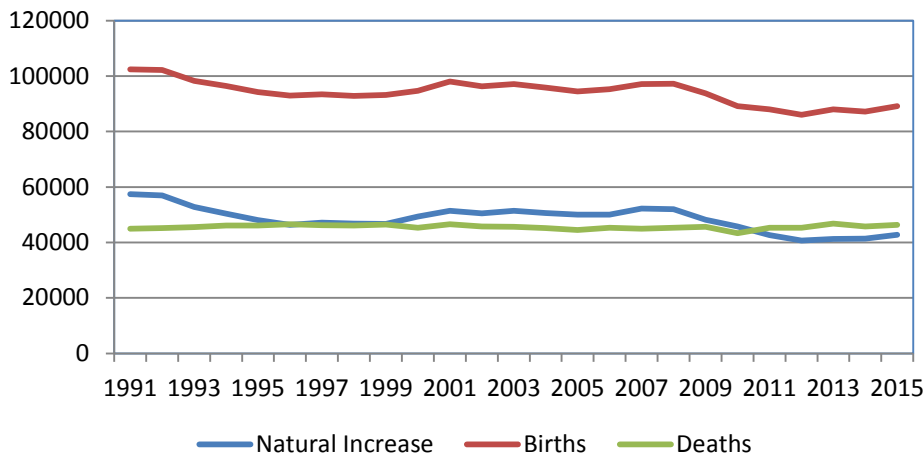
San Francisco Bay Area

Natural increase levels (births minus deaths) have declined as in other regions. Migration is cyclical following job growth trends. **But net migration has turned positive during the recent job surge.** In 2015 the Bay Area had 7.6 million residents or nearly 20% of the state population. Annual growth levels are above 80,000 residents and are close to the peak growth during the dot.com boom.

Bay Area Population Trends



Bay Area Natural Increase Trends

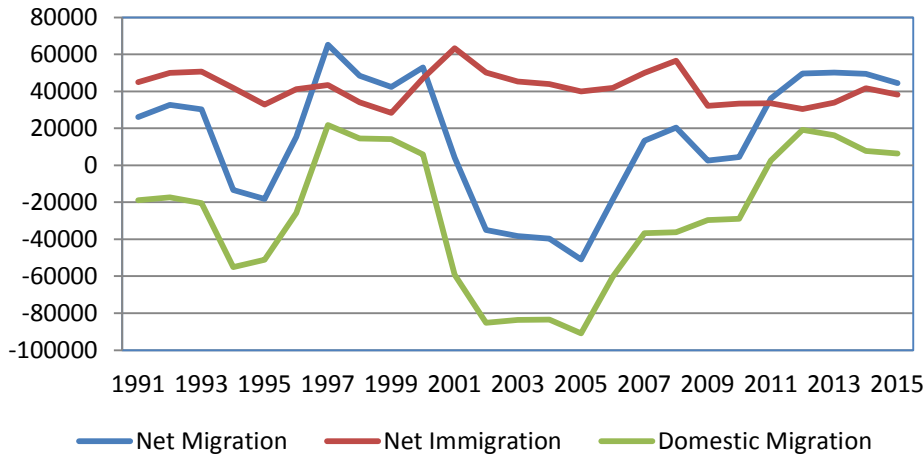


Natural increase levels have declined since 1990 primarily as a result of falling birth levels. The number of annual deaths has been mostly unchanged.

Two Bay Area migration trends depart from the statewide pattern. Both are probably the result of recent strong job growth. First, immigration levels have remained fairly constant, below peak levels but not on a downward trend.

Second, despite high housing costs, domestic migration has been positive meaning more people have moved to the region than from the region in recent years. Net migration is cyclical following job trends.

Bay Area Migration Trends



The Largest Counties

Bay Area County Population (Thousands)

1975		1995		2015	
Santa Clara	1,180.3	Santa Clara	1,573.5	Santa Clara	1,915.4
Alameda	1,107.9	Alameda	1,335.1	Alameda	1,619.2
San Francisco	695.4	Contra Costa	872.8	Contra Costa	1,116.4
Contra Costa	586.6	San Francisco	739.9	San Francisco	862.5
San Mateo	582.0	San Mateo	675.9	San Mateo	762.3
Sonoma	247.1	Sonoma	424.3	Sonoma	500.5
Marin	219.5	Solano	367.5	Solano	429.4
Solano	188.0	Marin	238.4	Marin	261.7
Napa	90.6	Napa	117.3	Napa	141.6

Source: DOF

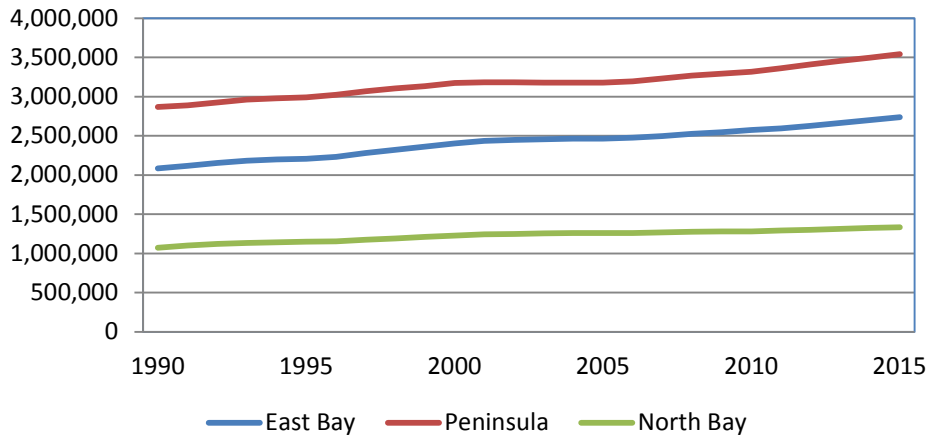
There has been little change in the order of counties by size. Contra Costa passing San Francisco and Solano passing Marin are the only changes.

Three Bay Area Subregions

The Peninsula region includes San Francisco, San Mateo and Santa Clara counties. The East Bay includes Alameda and Contra Costa counties while the North Bay includes Marin, Napa, Solano and Sonoma counties.

The Peninsula population is approximately 3.5 million in 2015, followed by the East Bay with 2.7 million and the North Bay with 1.3 million. Since 1990 the population growth rates have been relatively similar with the East Bay +31.4%, the North Bay +24.3% and the Peninsula +23.5%.

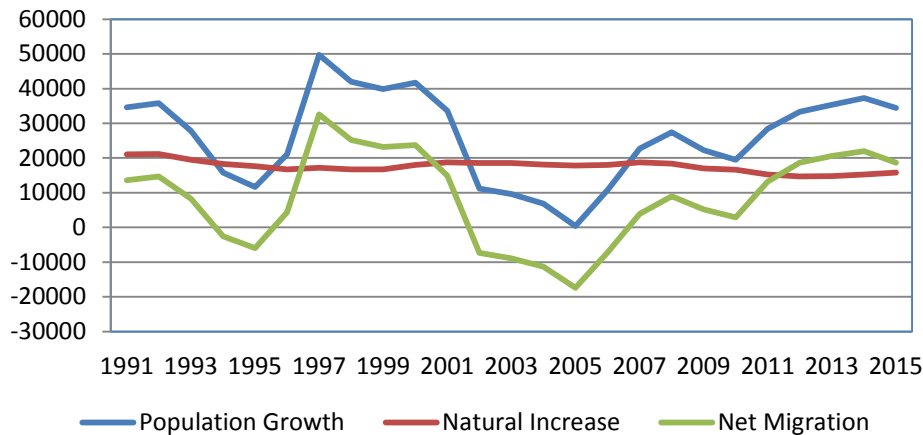
Total Population by Subregion



The East Bay Subregion

The contribution of natural increase was relatively steady until declining

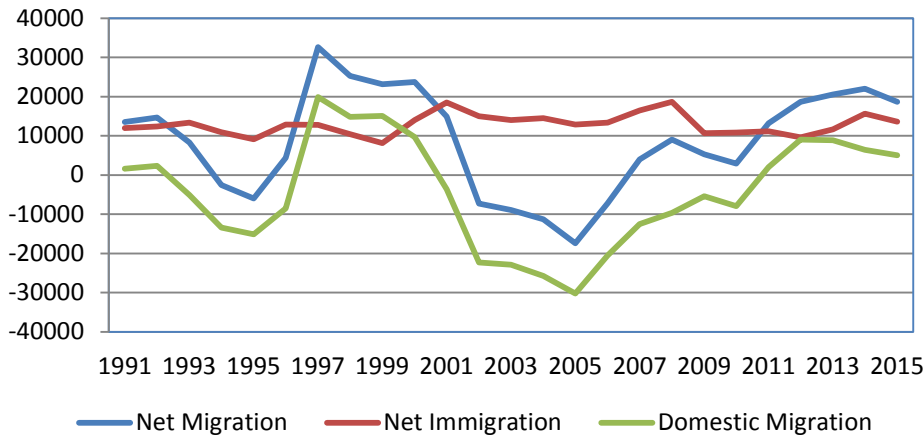
East Bay Population Trends



in recent years as birth levels declined and death levels increased. Population growth fluctuated with migration levels, which in turn followed job trends. Migration levels were positive for most years including all recent years and were negative only following the dot.com downturn and the earlier base closures and defense spending cuts.

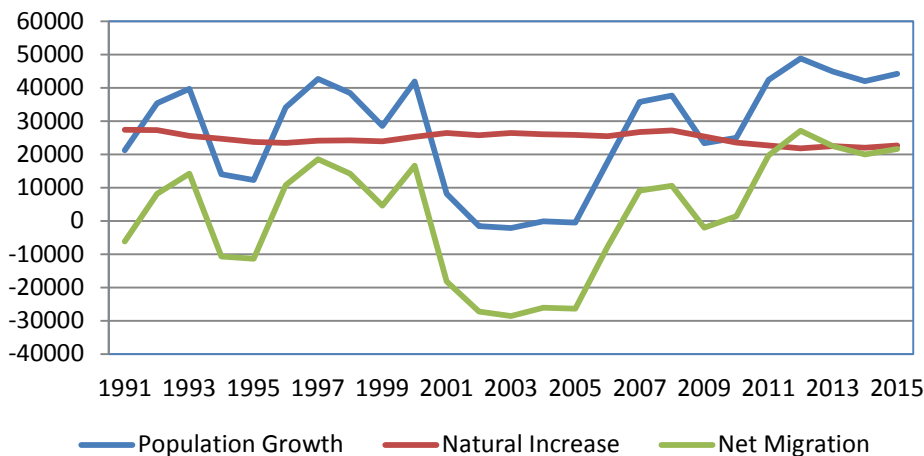
Foreign immigration levels have been positive throughout fluctuating between 10,000 and 20,000 per year. Domestic migration was positive only during periods of strong job growth including in recent years and the dot.com boom.

East Bay Migration Trends



The Peninsula Subregion

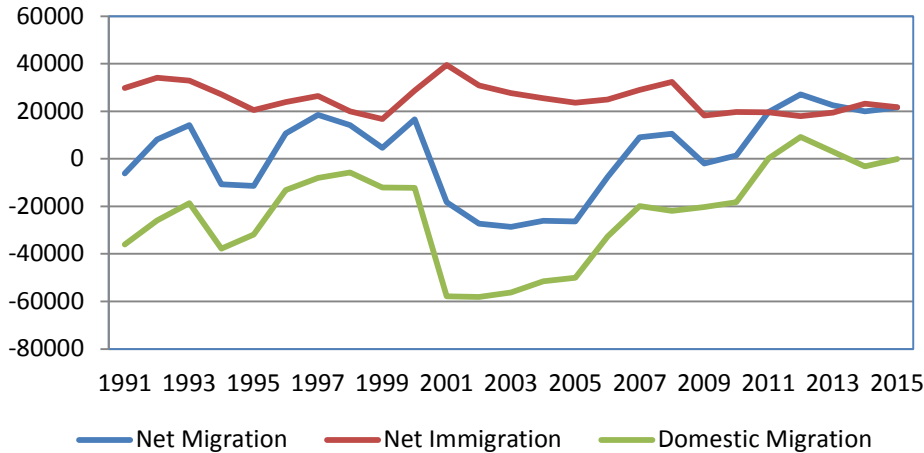
Peninsula Population Trends



Peninsula population growth has reached record levels measured by annual increase in the past few years. This is true even as the contribution from natural increase has declined as in most parts of the state. Net migration has turned positive and reached record levels since 2010 as job growth on the Peninsula has surged.

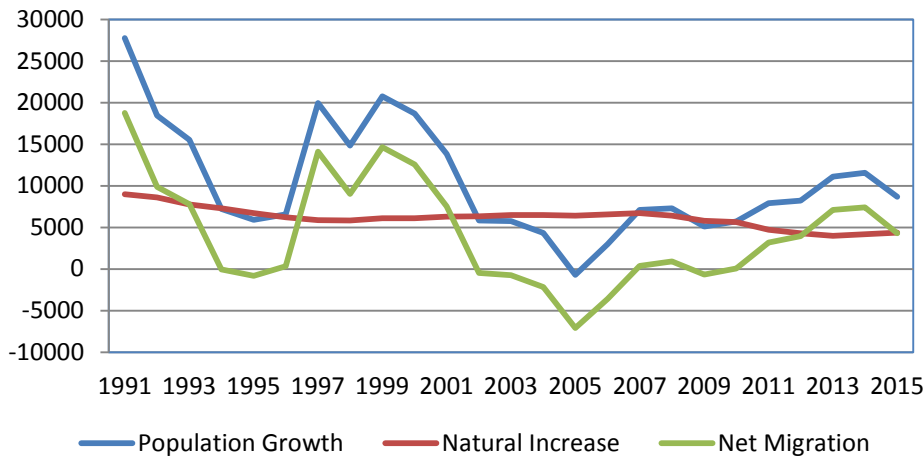
Foreign immigration is off record levels but still 20,000 per year. Domestic migration is cyclical following job trends but has turned from negative to neutral with the job growth since 2010 allowing overall migration to be positive despite high and rising housing costs.

Peninsula Migration Trends



North Bay Subregion

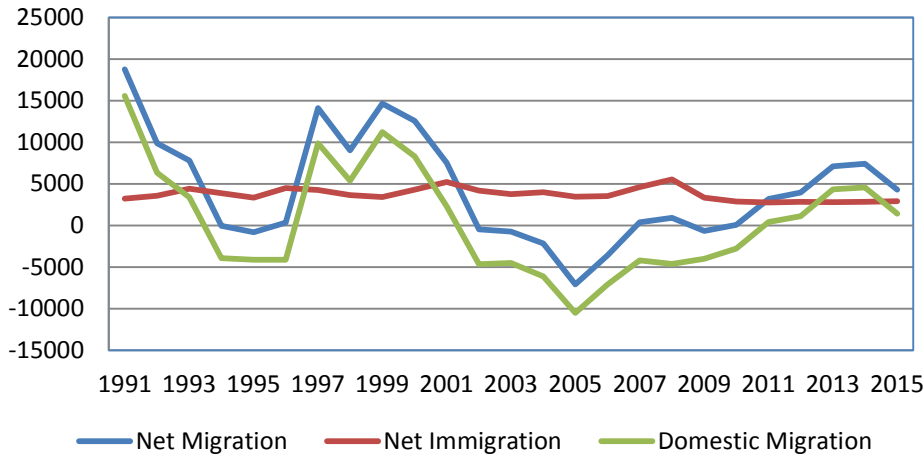
North Bay Population Trends



Population growth in the North Bay subregion declined sharply after the 1990s. It has increased since 2010 following regional job growth but not near the levels during the dot.com boom. Natural increase has declined by 50% as the result of falling birth levels and rising death levels. Migration levels were cyclical following job trends and have turned from negative to positive since 2007.

Foreign immigration levels ranged from 2,500 to 5,000 per year. Domestic migration was cyclical and has turned slightly positive during the recent regional job surge.

North Bay Migration Trends



The East Bay subregion was the growth leader between 1990 and 2010 while since 2010 the Peninsula subregion has seen the largest population growth. The North Bay subregion's share of regional population growth has declined in each time period since the 1990s. Annual population growth in the East Bay and Peninsula is higher in 2010-2015 than in previous periods while for the North Bay the highest annual growth levels were in the 1990s.

	Annual Growth			% of Regional Growth		
	1990-2000	2000-2010	2010-2015	1990-2000	2000-2010	2010-2015
East Bay	31904	17146	32345	42.2%	47.0%	36.9%
Peninsula	29499	14321	44451	39.0%	39.3%	50.7%
North Bay	14170	5016	10902	18.7%	13.7%	12.4%

Source: DOF

County Population Trends

Santa Clara, Alameda and Contra Costa counties has the most population growth in each time period. For Santa Clara and Alameda the highest annual growth was between 2010 and 2015 while for Contra Costa it was between 1990 and 2000.

Sonoma County has the fourth highest annual growth between 1990 and 2000 but both the annual growth and the county's ranking dropped in the next two time periods.

San Francisco moved from sixth between 1990 and 2000 to fourth between 2010 and 2015 with the largest annual growth in these years. San Mateo County also had the highest growth during the past five years.

For all counties annual growth was higher between 2010 and 2015 than between 2000 and 2010 as these years had very slow growth after the dot.com bust.

Solano County had the sixth highest annual growth between 2010 and 2015 but it was lower than the county's 1990-2000 average.

Marin and Napa are the two smallest counties and had the smallest growth in each time period.

Average Population Growth Per Year

	1990-2000		2000-2010		2010-2015
Santa Clara	19.2	Santa Clara	10.2	Santa Clara	25.2
Alameda	17.3	Alameda	6.6	Alameda	20.8
Contra Costa	14.7	Contra Costa	9.8	Contra Costa	12.9
Sonoma	7.1	San Francisco	3.0	San Francisco	10.8
San Mateo	6.0	Sonoma	2.4	San Mateo	8.5
San Francisco	5.6	Solano	1.7	Solano	3.3
Solano	5.3	San Mateo	1.2	Sonoma	3.3
Marin	1.8	Napa	1.2	Marin	1.9
Napa	1.4	Marin	0.5	Napa	1.1
Region	78.4		36.5		87.7

Source: DOF