

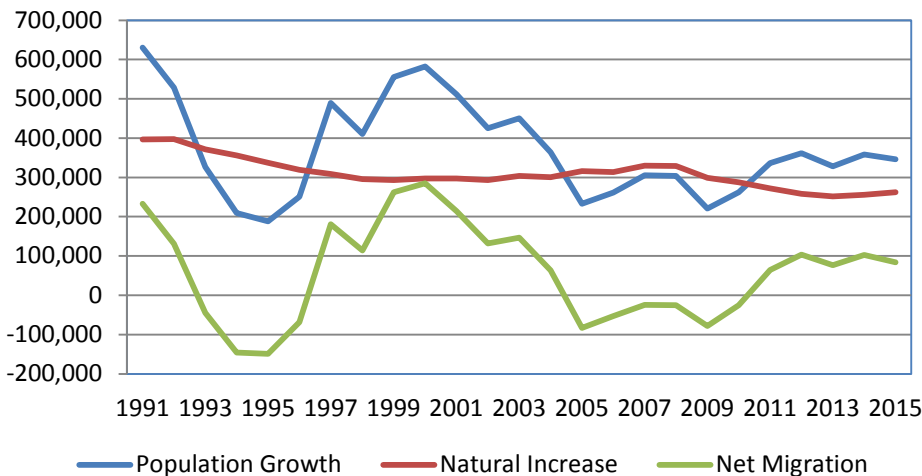
State and Regional Population Trends

The state and major regional economies have experienced some dramatic changes in population growth and composition over the past 25 years and, also, since 2010. All of the population data used here is from the California Department of Finance (DOF) July 1 population estimates.

California

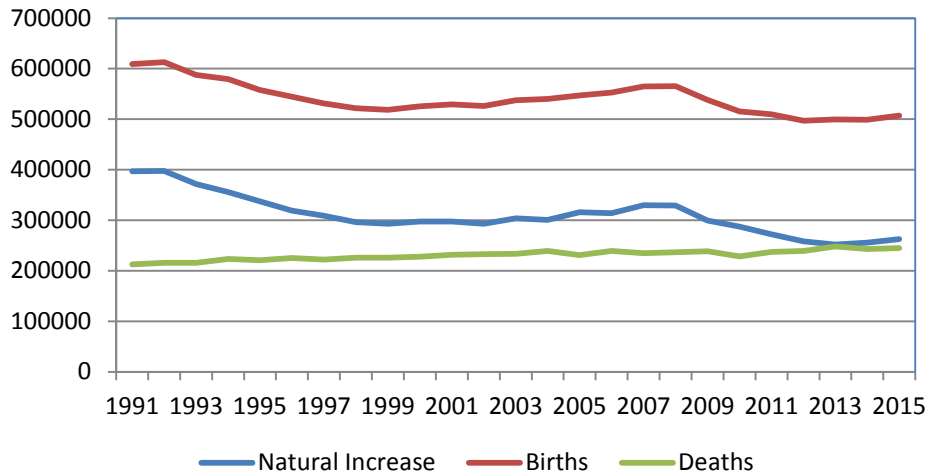
Population growth has slowed to around 350,000 per year from higher levels as both natural increase (births minus deaths) and net migration levels (foreign and domestic) have declined from previous peaks. Between 1990 and 2015 the state's population increased from 29.8 million to 39.1 million.

California Population Trends



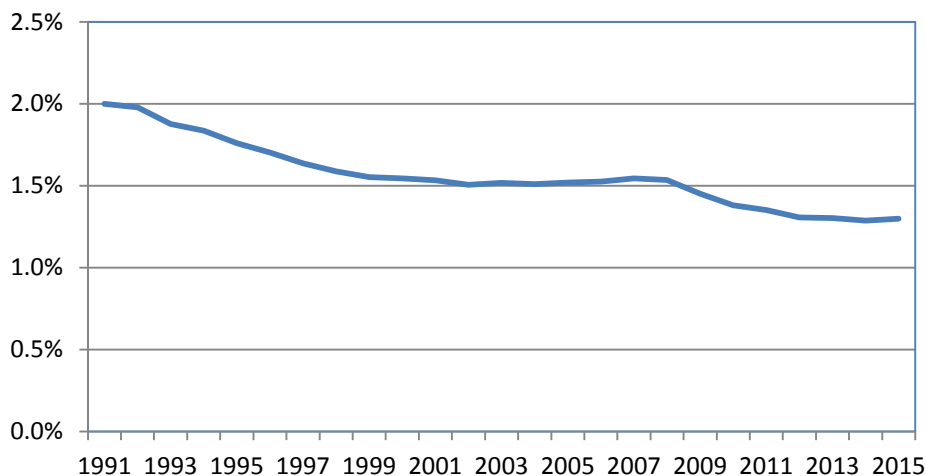
Annual natural increase has declined as birth rates and annual births have declined while the number of deaths has increased slightly. The number of annual deaths should continue to increase as the baby boomers age over the next two decades. The number of births should rise a bit but the contribution of natural increase to population growth will probably decline over time.

California Natural Increase Trends



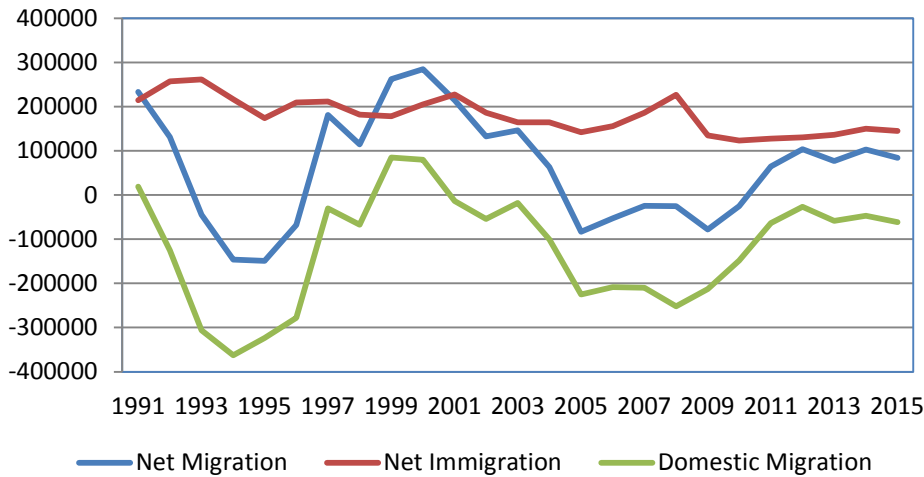
The number of births relative to the state's population has declined sharply and is projected by DOF to continue dropping. Births were equal to 2.0% of the state's population in 1991 and 1.3% in recent years. The decline in births has been reflected in a leveling off in school enrollment statewide.

Births as a % of Total Population



The contribution of net migration is cyclical—rising after strong job growth and falling after the economy slows. Foreign immigration levels, on average, are lower than in the 1990s but have remained positive and above 100,000 per year throughout the years. On the other hand domestic migration has been mostly negative but moves with the economy.

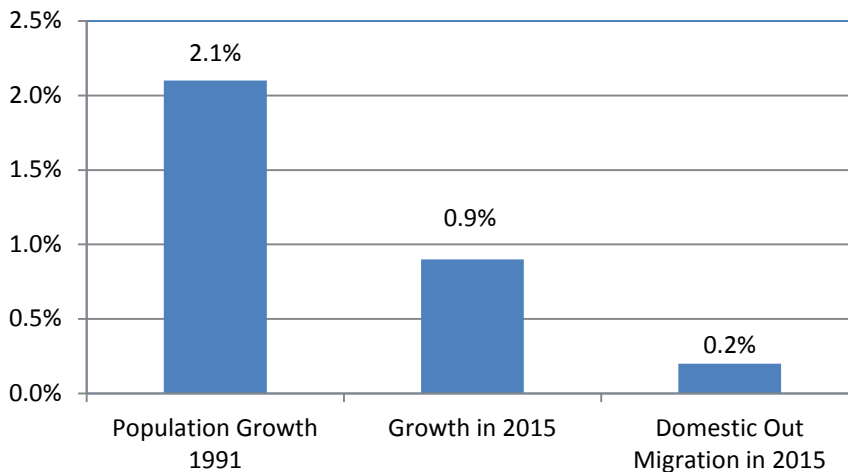
California Migration Trends



The bottom line is that currently natural increase accounts for approximately 250,000 residents per year and net migration another 100,000.

It is important to note 1) how much population growth has slowed since 1990 and 2) how small domestic migration (in or out) is relative to the state's total population. In 1991 population growth was 2.1% while in 2015 it had fallen to 0.9%. And net domestic outmigration of 61,000 was only 0.2% of total population.

Change as % of Total Population



Regional Growth Comparisons

In this report counties are grouped into six regions:

The Los Angeles (L.A.) Basin--Los Angeles, Orange, Riverside, San Bernardino and Ventura counties and also Imperial County to be consistent with the Southern California Association of Governments (SCAG) regional planning area.

The San Francisco (S.F.) Bay Area—Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma counties—the ABAG planning area.

The San Joaquin (S.J.) Valley including Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus and Tulare counties. The San Diego region includes San Diego County, the SANDAG planning area.

The Sacramento region—El Dorado, Placer, Sacramento, Sutter, Yolo and Yuba counties, the SACOG planning area and

The Rest of State region includes all the remaining counties

State and Regional Population Growth Comparison

	2015		1990-2015		
	Pop Millions	2015 % of Pop	Growth Thousands	1990-2015 Growth Rate	2010-2015 Growth Rate
California	39.1	100.0%	9,243.3	31.0%	4.6%
L.A. Basin	18.9	48.3%	4,182.2	28.5%	4.2%
S.F. Bay Area	7.6	19.5%	1,587.0	26.4%	6.1%
S.J. Valley	4.2	10.7%	1,415.2	51.3%	4.8%
San Diego	3.3	8.4%	770.6	30.8%	5.6%
Rest of State	2.7	7.0%	472.7	20.9%	1.8%
Sacramento	2.4	6.2%	815.6	50.5%	4.6%

Source: DOF, percentages calculated from unrounded estimates

The L.A. Basin is the largest region with nearly 50% of the state’s population. The region has grown slightly more slowly than the state since 1990 and also since 2010. The Bay Area is the second largest region with nearly 20% of the state’s population. The Bay Area has grown more slowly than the state since 1990 **but was California’s fastest growing region since 2010.**

The San Joaquin Valley and Sacramento regions were California’s fastest growing regions since 1990 but in each region growth slowed after the housing crash in 2007. The Rest of State region was the slowest growing region since 1990 and also since 2010 as most population growth was centered in the larger metropolitan areas and near the coast.

The pattern of regional growth changed as the decades passed. For most of the period the San Joaquin Valley and Sacramento regions were the fastest growing. Since 2010 the Bay Area leads the state in growth rate while the Rest of State region has fallen to last place.

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%

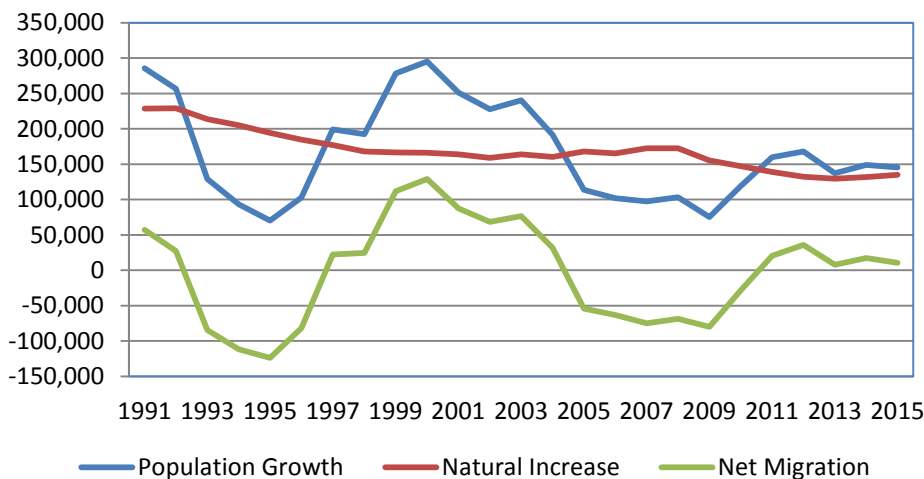
Source: DOF

Los Angeles Basin

Between 1990 and 2015 regional population increased from 14.7 million to 18.9 million. The region grew more slowly than the state and accounted for 48.1% of state population in 2015, down slightly from 49.2% in 1990. The major trends were similar to state trends—declining population growth, falling birth rates and levels, and cyclical migration trends following job growth patterns.

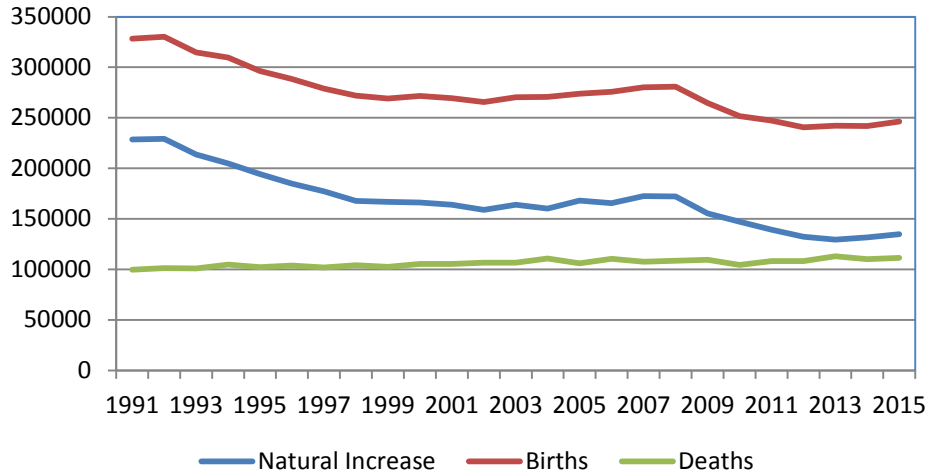
One difference, discussed more below, is that the region accounted for the large majority of out-migration from the state.

LA Basin Population Trends



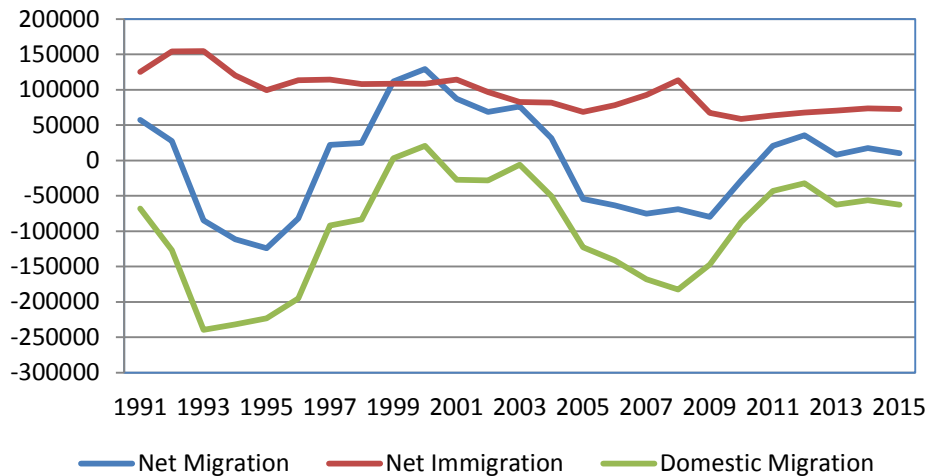
Natural increase trends mirrored the state trends with falling birth levels and slowly rising numbers of deaths.

LA Basin Natural Increase Trends



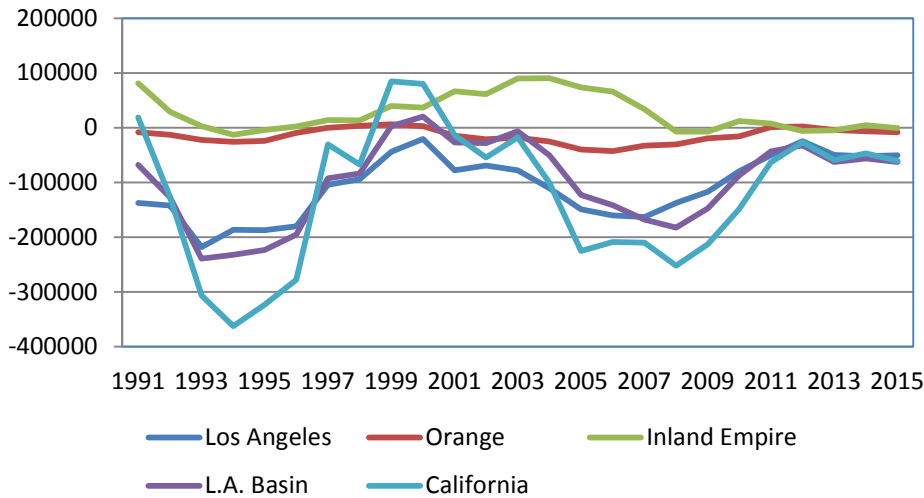
Foreign immigration was positive throughout although lower in recent years than prior to the recession. Domestic migration was cyclical and mostly negative.

L.A. Basin Migration Trends



The L.A. Basin accounted for most of the state's domestic out migration as shown below. Within the region Los Angeles County accounted for most of the net out migration in most years. In some years migration was positive into the Inland Empire (Riverside and San Bernardino counties) indicating that some of the migration from Los Angeles County stayed within the region.

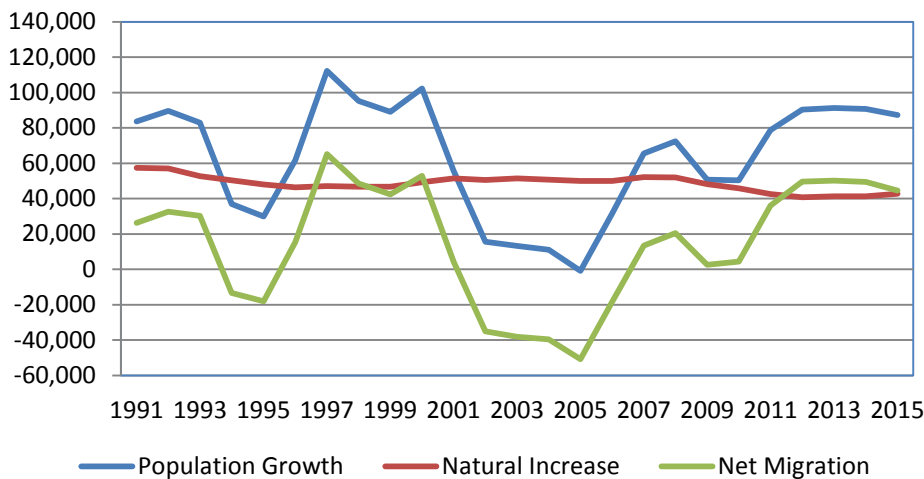
Domestic Migration Within L.A. Basin



San Francisco Bay Area

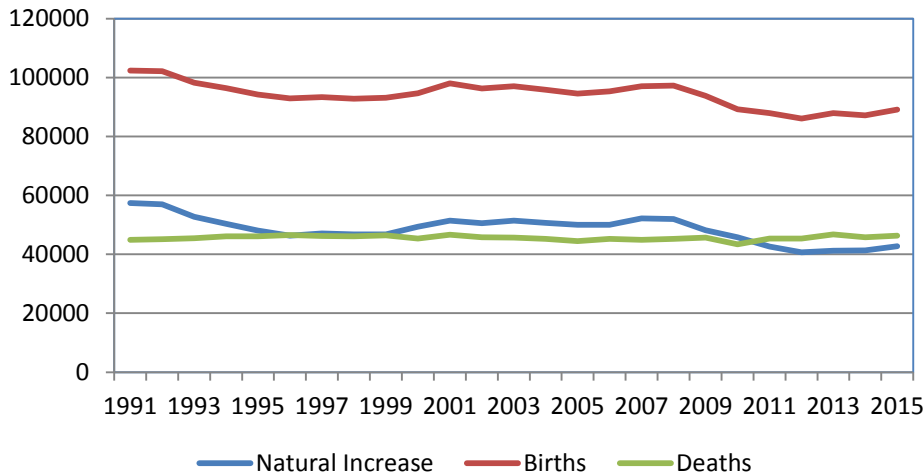
The Bay Area population growth pattern is similar to that of the state with one large exception. The region has gone from trailing the state in population growth for most of the period since 1990 to leading the state in percentage population growth since 2010. Natural increase levels have declined as 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.

Bay Area Population Trends



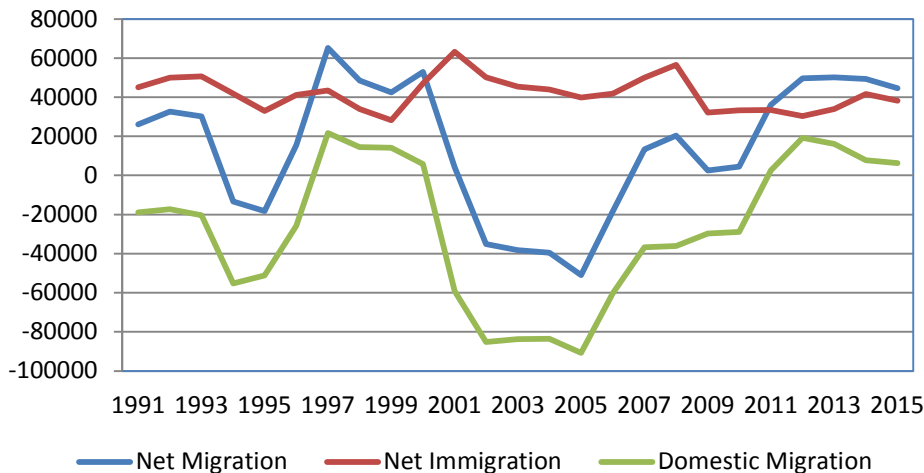
Natural increase levels have declined since 1990 primarily as a result of falling birth levels.

Bay Area Natural Increase Trends



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.

Bay Area Migration Trends

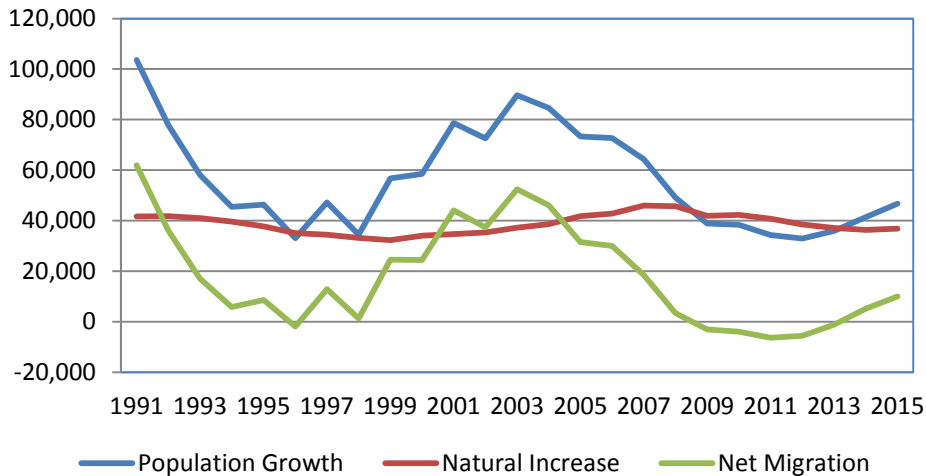


San Joaquin Valley

The Valley had periods of large population growth after 2000, which ended when housing prices plummeted and foreclosures surged in the region. Natural

increase levels were relatively constant while migration fluctuated with the housing boom and bust. In recent years natural increase has accounted for most

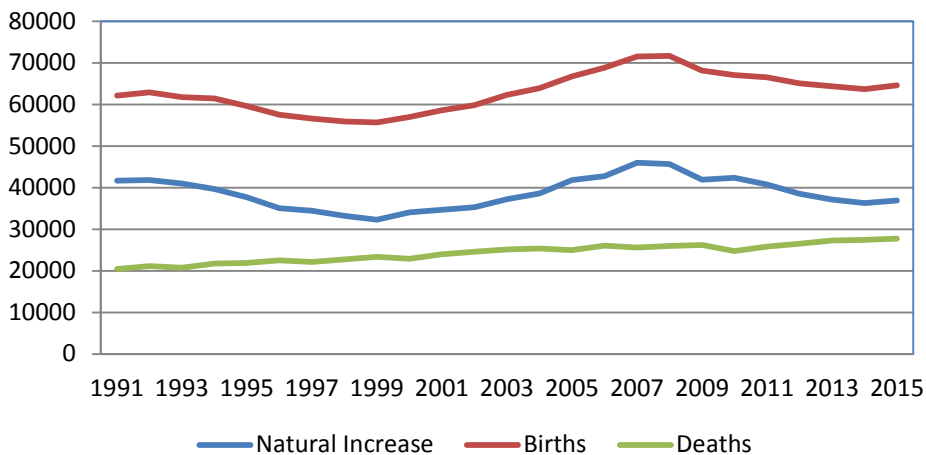
San Joaquin Valley Population Trends



of the region’s population growth. In 2015 the Valley had 4.2 million residents, just over 10% of the state’s population.

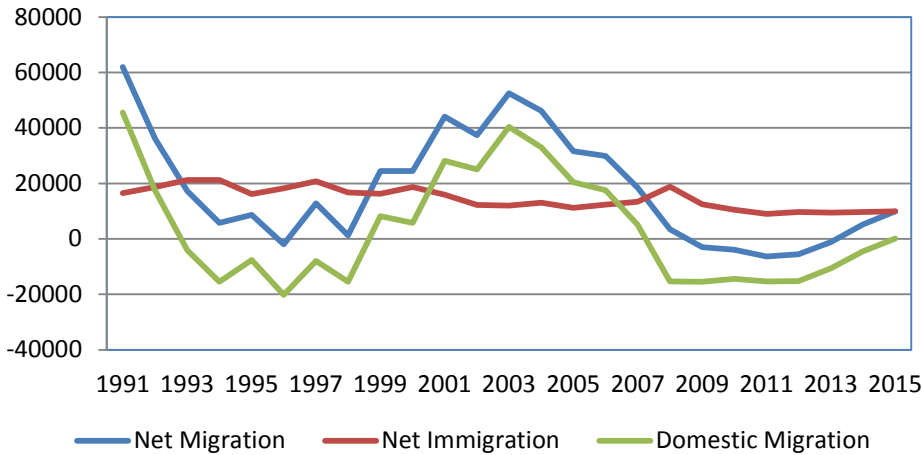
Unlike other regions birth levels increased in the Valley between 1990 and 2015. Death levels rose slowly keeping annual natural increase levels fairly constant.

S. J. Valley Natural Increase Trends



Foreign immigration levels trended slightly lower over the period while domestic migration was cyclical following job and housing trends. Total migration levels except for the mid 2000s were slightly negative, especially after the housing market crashed in the Valley.

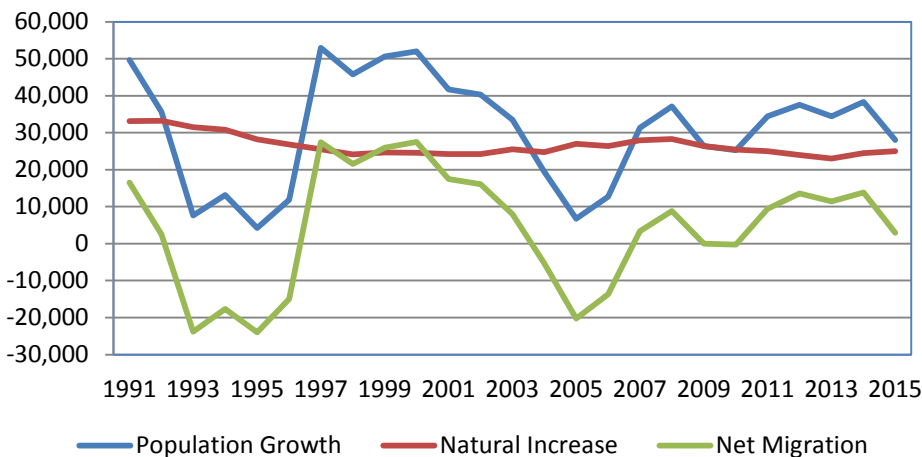
San Joaquin Valley Migration Trends



San Diego County

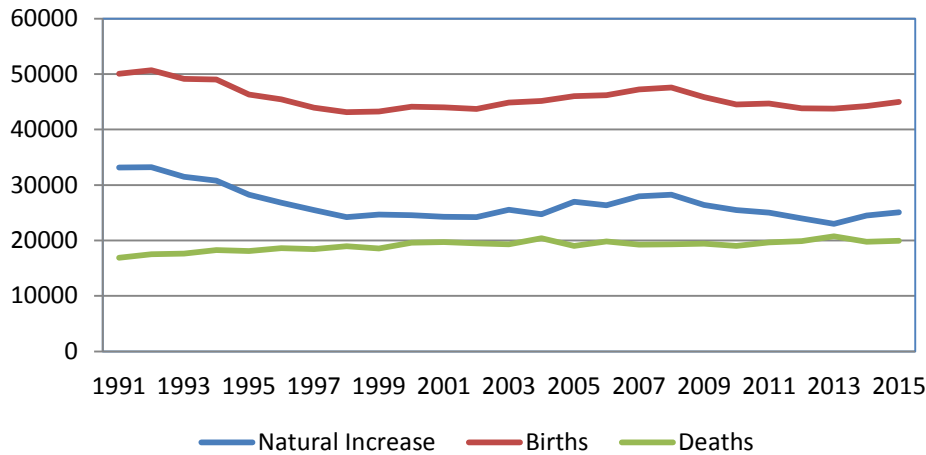
San Diego County had 3.3 million residents in 2015, the state's fourth largest region with 8.4% of the state's population. Population growth has remained between 30,000 and 40,000 per year, lower than in the peak years but recently one of the state's fastest growing regions. Natural increase levels are below the peak but relatively constant in recent years. Net migration has been cyclical but between 0 and 10,000 per year since the recession.

San Diego Population Trends



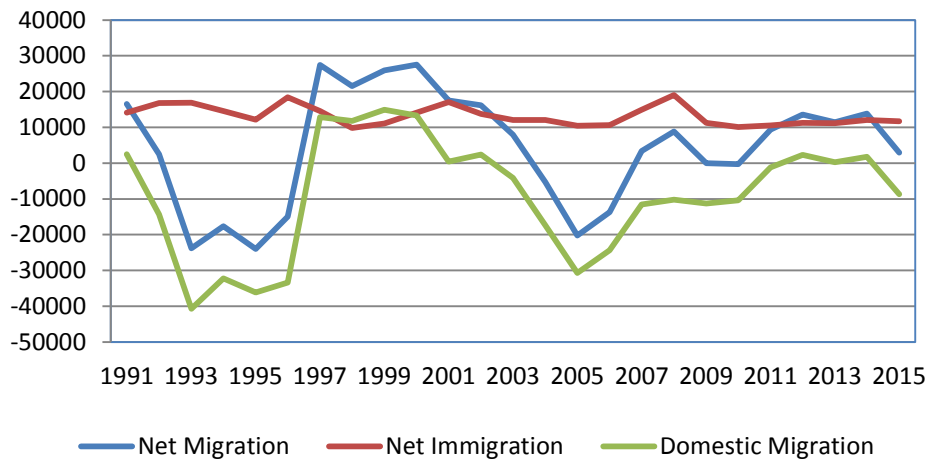
The contribution of natural increase to San Diego County population growth has been relatively constant with both birth and death levels mostly unchanged between 1990 and 2015.

San Diego Natural Increase Trends



Immigration levels have been near 10,000 in recent year, below peak levels. Domestic migration has been mostly negative and cyclical with job growth trends. Net migration levels have been mostly negative except in string job growth periods.

San Diego Migration Trends

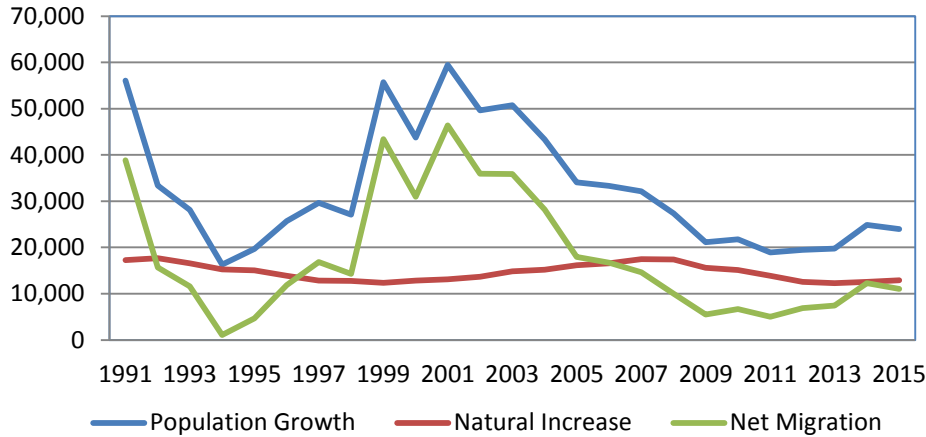


Sacramento Region

The Sacramento region had 2.4 million residents in 2015 or 6.4% of the state's population. The region was the second fastest growing region in California since

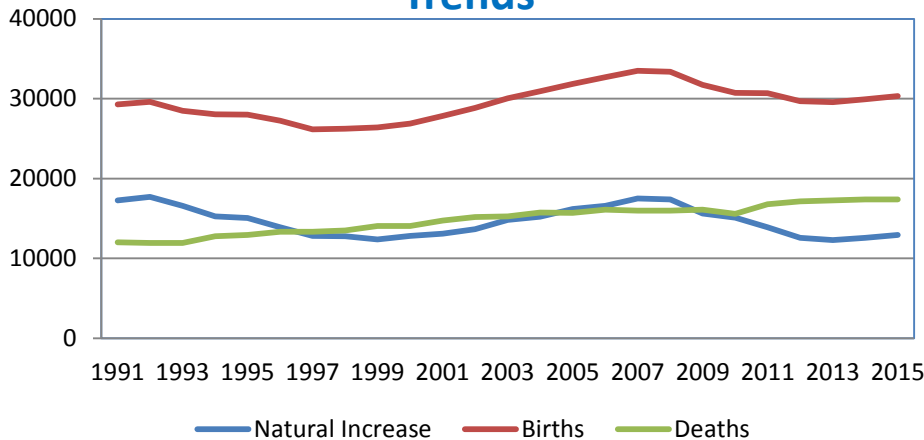
1990. Population growth was heavily influenced by trends in net migration while natural increase contributed a small but steady level of population growth.

Sacramento Region Population Trends



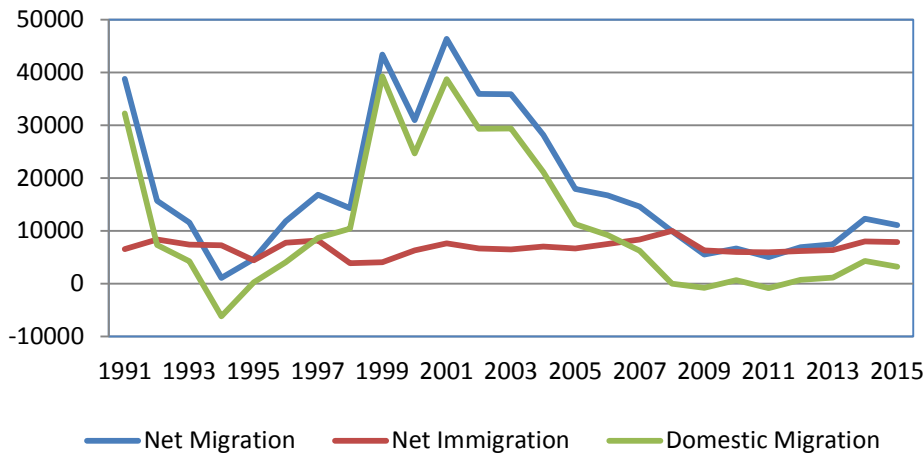
Natural increase levels declining as death levels rise and births remain relatively constant in the region.

Sacramento Region Natural Increase Trends



Foreign immigration remains a small but relatively constant contribution to regional population growth. Domestic migration is cyclical following job and housing market trends. Domestic migration fed population growth after 2000 until the housing market crash and recession. In recent years domestic migration has been close to 0 each year.

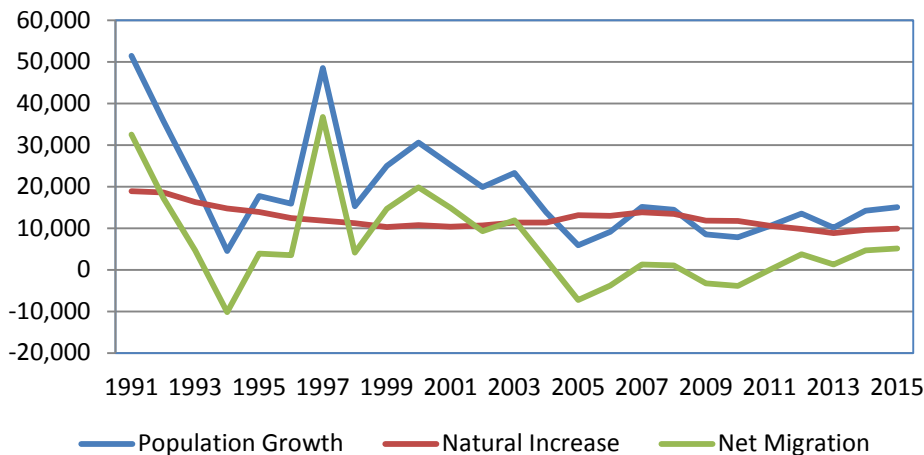
Sacramento Region Migration Trends



Rest of State Region

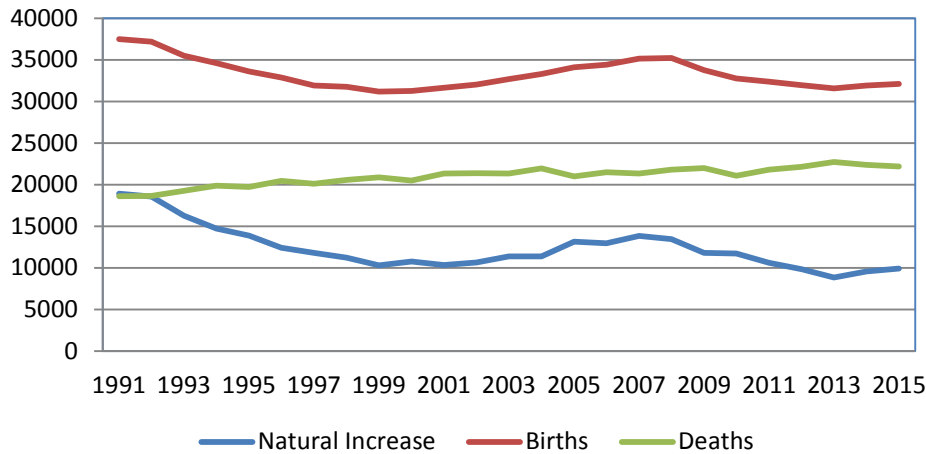
Population growth in the rest of state region slowed dramatically after 2000, averaging near 10,000 per year for most of the period. The 29 counties in the region had 2.7 million residents in 2015 or 7.0% of the state's population. Natural increase levels declined during the period but still accounted for most of the region's growth. Net migration has been close to 0 since 2000.

Rest of State Population Trends



Natural increase levels declined as birth levels fell and death levels increased over the period.

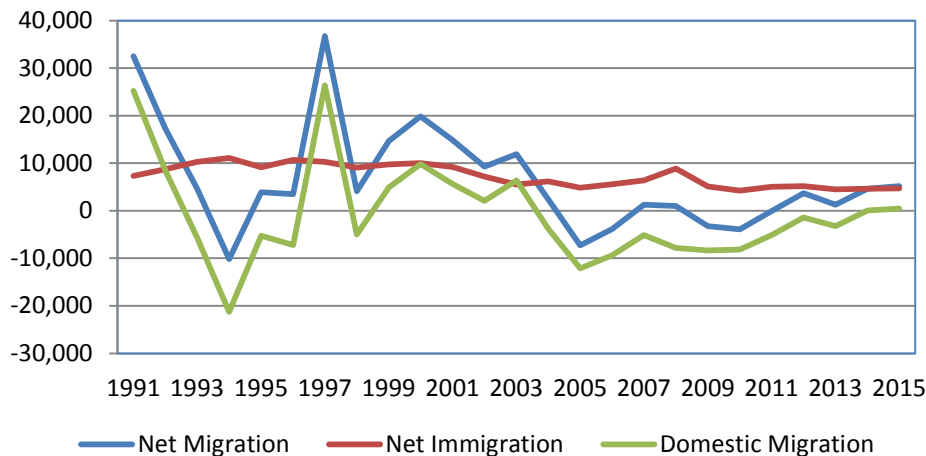
Rest of State Natural Increase Trends



Immigration levels have declined from near 10,000 to near 5,000 annually in recent years. Domestic migration has trended up toward 0 after being negative for many years.

It is likely that some of the slow growth in the region is the result of reductions in state prison populations.

Rest of State Migration Trends



County Population Trends

There has not been that much change in the largest counties since 1975. San Diego passed Orange. Riverside and San Bernardino passed Santa Clara and Alameda. Fresno and Riverside joined the list while San Francisco and San Mateo dropped off.

Ten Largest Counties (Thousands of Residents)

	1975		1995		2015
Los Angeles	7,190.3	Los Angeles	9,101.1	Los Angeles	10,192.4
Orange	1,713.4	San Diego	2,615.2	San Diego	3,275.5
San Diego	1,594.1	Orange	2,604.5	Orange	3,165.2
Santa Clara	1,180.3	San Bernardino	1,580.4	Riverside	2,331.0
Alameda	1,107.9	Santa Clara	1,573.5	San Bernardino	2,127.7
San Bernardino	696.8	Riverside	1,378.8	Santa Clara	1,915.4
San Francisco	695.4	Alameda	1,335.1	Alameda	1,619.2
Sacramento	691.6	Sacramento	1,120.7	Sacramento	1,489.3
Contra Costa	586.6	Contra Costa	872.8	Contra Costa	1,116.4
San Mateo	582.0	Fresno	756.0	Fresno	981.0

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

The ten fastest growing counties vary substantially by time period. Only Riverside and Placer are among the ten fastest in each time period. The 1975-1995 period has five Rest of State counties among the fast growers along with two (El Dorado and Placer) from the Sacramento region, two (Riverside and San Bernardino) from the Los Angeles Basin and one (Madera) from the San Joaquin Valley.

Between 1995 and 2010 there were five counties from the San Joaquin Valley, three from the Los Angeles Basin and two from the Sacramento region with none from any of the other regions.

The pattern shifted again after 2010 where the list of fast growers included five from the Bay Area, two from the Los Angeles Basin and one each from the San Diego, Sacramento and San Joaquin Valley regions.