

A stylized map of the San Francisco Bay Area is shown in the background. The landmasses are white, and the water areas are a solid dark blue. The map includes the San Francisco Peninsula, the Golden Gate Bridge, and the surrounding islands and bays.

**Bay Area**  
**Plan**

# Projections 2013

 Association of Bay Area Governments



## Association of Bay Area Governments

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A stylized map of the San Francisco Bay Area is shown in the background. The landmasses are white, and the water areas are a solid purple color. The map includes the San Francisco Peninsula, the East Bay, and the South Bay, with major water bodies like San Francisco Bay and San Pablo Bay clearly visible.

Bay Area  
**Plan**

# Projections 2013

 Association of Bay Area Governments

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# 1.

## General Introduction



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# General Introduction

Projections 2013 is the most recent in the Association of Bay Area Governments' series of statistical compendia on demographic, economic, and land use changes in coming decades. The projections outlined in this document cover the period from 2010 through 2040. Projections 2013 consists of a book and electronic files with tables summarizing projections at the regional, county, city and Priority Development Area (PDA)1 levels.

The projections provide details about the distribution of growth throughout the region, as described in Plan Bay Area. Plan Bay Area, the Sustainable Communities Strategy for the San Francisco Bay Area, was adopted in July 2013. The plan is a roadmap to the future for the Bay Area, outlining a pattern for new development and infrastructure investments that will meet the needs of a changing population and economy while conserving and improving the region's natural resources and environment.

The projections illustrate how the region will accommodate growth if local jurisdictions adopt a set of policies consistent with the vision of Plan Bay Area. These projections should be used with an understanding of how they were developed. The region-wide projections are built from a reasonable expectation of the Bay Area's share of national economic growth and an understanding of changing demographic structure. The distribution of growth within the region among counties, cities and PDAs is built around expected local policies and infrastructure investment as well as historic economic behavior.

Based on the economic composition of the Bay Area and expected growth nationwide, the region is projected to add approximately 1.1



million new jobs between 2010 and 2040. Employment has already grown by nearly 123,000 jobs between 2010 and 2012. Thus, more than 10 percent of the projected employment growth has occurred during the first two years of the 30-year projection period. Much of the job growth in the early years of this decade will absorb the Bay Area's unemployed and underemployed workers, as the region's economy recovers from the loss of over 250,000 jobs during the Great Recession, which began in 2007 and reached a trough nationwide in

2009. Going forward, growth of the labor force will be tempered by the aging of the baby boomers. Through 2040, the Bay Area would need over 2.1 million more people to provide a labor force large enough to avoid an increased rate of in-commuting from jurisdictions beyond the nine counties.

Regional growth patterns must respond to the dramatically changing population base. The number of people 65 years of age and older will

more than double over the next 30 years, expanding from 12 percent to 22 percent of the population. The cohort of adults between 25 and 44 will grow more slowly (16 percent), dropping from 30 percent to 27 percent of the population. There will be very little change in the number of adults between 45 and 64 years old, and their share in the population will drop from 27 to 21 percent. After the aging baby boomers, the fastest growing population cohort will be those 24 and under, who nevertheless will drop from 31 to 30 percent of the population. These differences are likely to affect residential choice, as the population in prime home buying years grows more slowly compared to those just forming households at one end of the spectrum and to those downsizing at the other end.

Other changes may result from an increasingly diverse ethnic mix within the region and a changing industrial mix that will influence the growth and structure of occupations and wages. Significant shifts in earnings opportunities as well as changing income levels that come with retirement, may affect the mix of incomes among the region's households.

These trends have come at a time when the State of California mandates attention to sustainability in land use decisions. The "California Sustainable Communities and Climate Protection Act of 2008" (Senate Bill 375) requires the San Francisco Bay Area and the state's other metropolitan areas to reduce per capita greenhouse gas emissions from cars and light trucks through a Sustainable Communities Strategy that promotes compact, mixed-use commercial and residential development. Plan Bay Area is the result of a multi-year collaborative process to develop the region's first Sustainable Communities Strategy in compliance with state law. The Plan establishes a regional growth pattern that accommodates growth and responds to changes in the population base and economic conditions.

In its efforts to reduce regional greenhouse gas emissions by seven

percent by 2020 and 15 percent by 2035, Plan Bay Area focuses on both transportation and land use, replacing Transportation 2035 as the new Regional Transportation Plan for the Bay Area. Plan Bay Area reflects a commitment among local governments and regional and transit agencies to promote more compact development and the creation of complete communities. Complete communities have a range of housing options at various affordability levels and a mix of shops, offices, services, and amenities such as parks. The primary mechanism for encouraging land use patterns that benefit the region are transportation-related financial incentives to local governments that focus housing growth in Priority Development Areas (PDAs) through their planning and zoning policies. PDAs are sites selected by local jurisdictions that represent a mix of infill locations in older cities and mixed use concentrations in suburban parts of the region. Local governments began to identify PDAs in 2008 as part of FOCUS, a regional

initiative led by ABAG and MTC. Under Plan Bay Area, 78 percent of new housing and 62 percent of new jobs will be concentrated in PDAs. By emphasizing growth in PDAs, the projections in this document represent a notable departure from past trends in planning, land use, and development in much of the Bay Area.





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## METHODOLOGY

For the benchmark year of 2010, the report draws on US Department of Commerce, Bureau of the Census, US Department of Labor, Bureau of Labor Statistics, and California Department of Finance figures. For the projections, at the regional level, ABAG relied on shift-share employment projections provided by the Center for the Continuing Study of the California Economy and used projections of age and ethnic structure produced by the California Department of Finance to project the population growth necessary to meet labor force demand from employers. Historic patterns of household structure by age of head of household and ethnicity were used in conjunction with population projections to estimate the size and number of households. ABAG used a series of distribution models to distribute projected changes in population, households, and employment at the regional, county, city, and Priority Development Area (PDA) levels. The projected distribution of population, employment and housing within the region is also informed by local land use and growth policies

and expected infrastructure investments. Additional information on the methodology is provided in the Final Forecast of Jobs, Population and Housing, a supplemental report to Plan Bay Area.

## PRIORITY DEVELOPMENT AREAS

PDA's are located near transit and typically cover a minimum of 100 acres. Local jurisdictions have defined the character of their PDA's according to existing conditions and future expectations. The seven PDA place types are summarized below.

### PDA Classifications:

- Regional Center (regional downtowns; primary centers of economic and cultural activity)
- City Center (commuter hub with a mix of residential, employment, retail, and entertainment uses drawing from surrounding area)
- Suburban Center (contain residential, employment, retail, and entertainment uses with a mix of transit services connected to the regional network)
- Transit Town Center (local-serving centers of economic and community activity with a mix of transit options)
- Urban Neighborhood (primarily residential moder-



Downtown Oakland PDA-Uptown

ate-to-high density areas with local serving retail services and other small businesses or older industrial uses)

- Transit Neighborhood (low-to-moderate density residential areas served by rail transit or multiple bus lines)
- Mixed-Use Corridor (transit-served areas with a mix of a moderate-density housing, services, retail, employment, and civic or cultural uses)



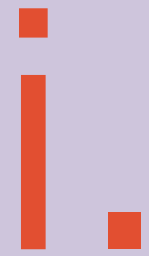
Downtown San Leandro-TOD



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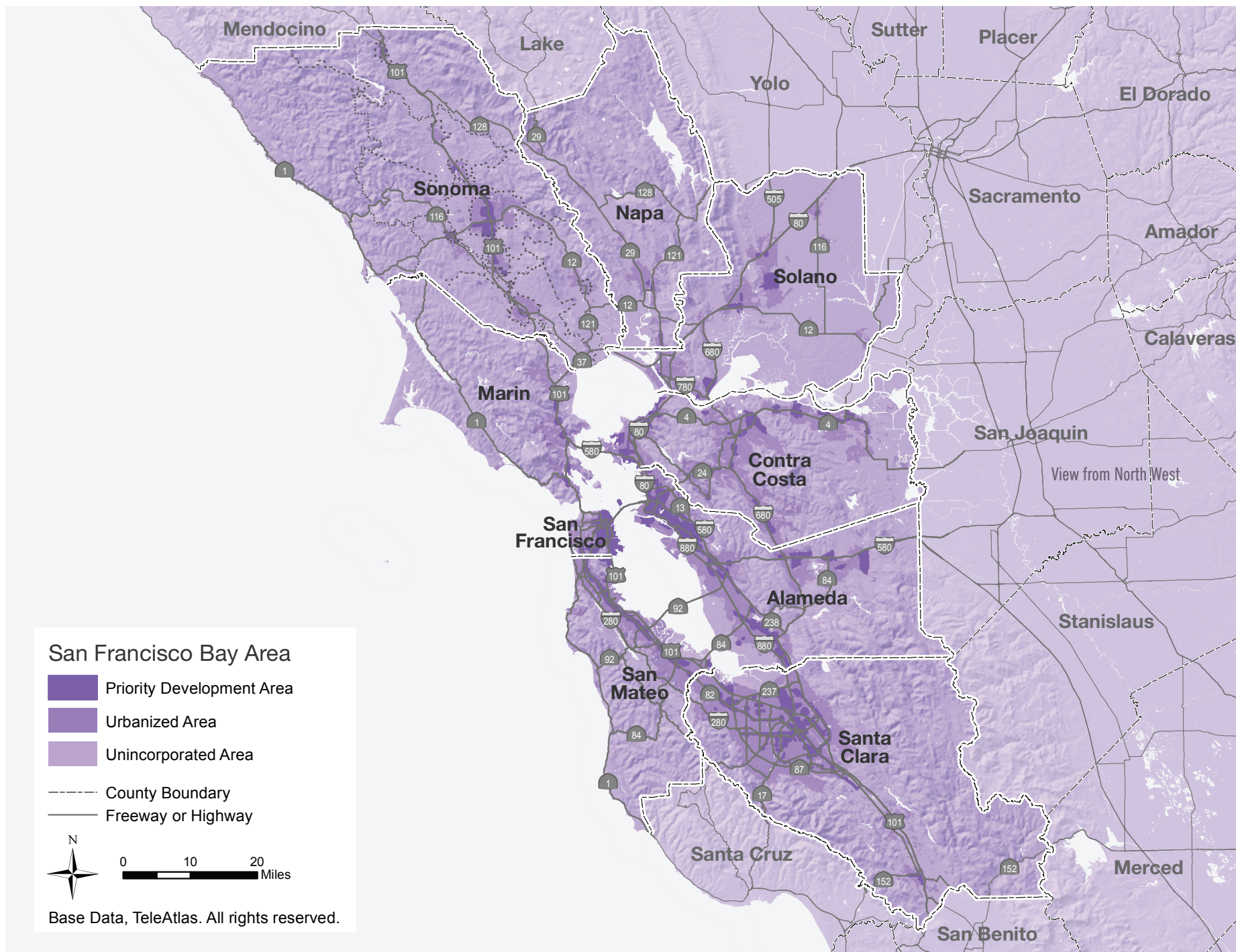
## Projections 2013





# San Francisco Bay Area





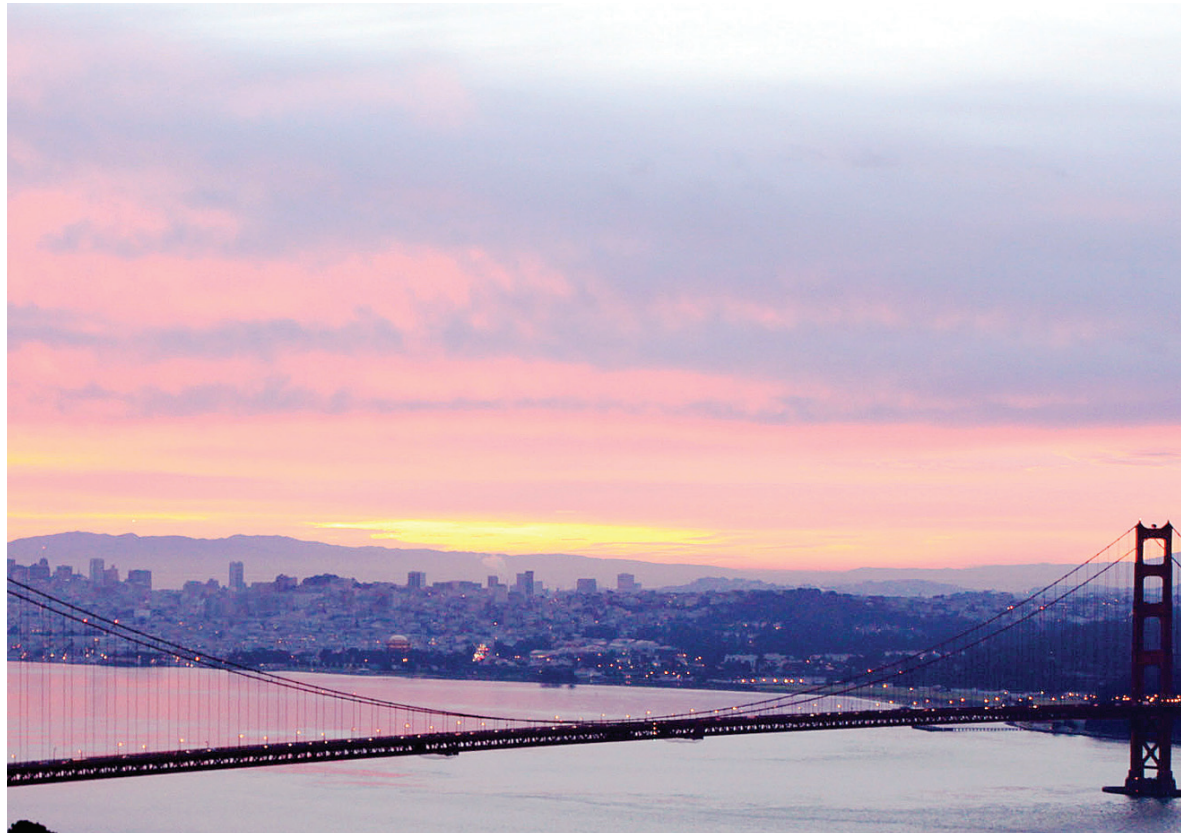


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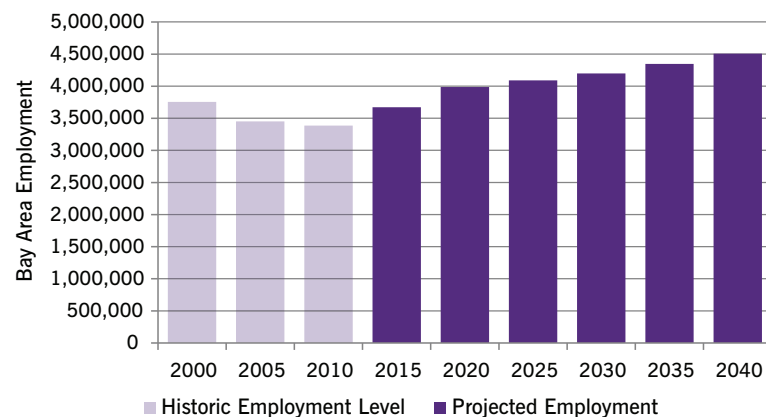
# San Francisco Bay Area

The San Francisco Bay Area has much scenic beauty, a strong economy, a well-connected transportation system, and diversity in terms of population, geography, and urban form. While many in the Bay Area enjoy a high quality of life, future challenges remain. For example, shortages of affordable housing, long commutes and congestion have been long term consequences of the established distribution of employment and housing.

The Bay Area's diversity is reflected in the differences among its nine counties and 101 cities. Yet there are many shared characteristics among places within counties or larger geographic areas. Where we discuss these commonalities below, the North Bay includes Marin, Napa, Solano, and Sonoma counties; the East Bay covers Alameda and Contra Costa counties; South Bay refers to Santa Clara County; and San Francisco and the Peninsula includes San Francisco and San Mateo counties.



View from Northwest



Bay Area Employment 2000-2010, Projections Through 2040

## ECONOMY

As of 2010, the Bay Area provided 3.4 million jobs. Employment in the Bay Area is projected to grow by 33 percent from 2010 to 2040, adding over 1.1 million jobs. In historic context, a portion of the employment growth returns to the region prior peak levels of employment. By 2015, employment is predicted to surpass the smaller peak reached at the top of the housing boom, but will likely still be below the 2000 peak generated by the dot-com boom. Between 2010 and 2020, total jobs are projected to increase by 18 percent, while the next two 10-year periods will experience growth rates of 5 and 7 percent, respectively. In other words, more than half of the total projected employment growth occurs before 2020, and more than half of that first decade of growth simply returns the region to the job levels of 2000. The rate of projected employment growth slows after 2020. Employment change between 5-year points is “smoothed” in this projection; the possible future recessions, where employment decreases for a limited period, are not shown. Thus, for the purposes of this report,

we use the term “job growth” to essentially mean “net increase in employment” between periods.

The most concentrated employment centers are in Santa Clara and San Francisco counties. Both locations have higher shares of jobs than population. In contrast, Contra Costa, Solano and Sonoma counties each have higher proportions of population than of jobs. The remaining four counties have fairly balanced proportions of jobs and population. The projected shares of household and job growth are more balanced than existing shares, although there are still counties where job growth is projected to outpace household growth (San Francisco) or the reverse (Contra Costa).

The geographic pattern of projected job growth is different than the previous trend that began in the mid-1980s, when employment expanded most extensively in suburban areas. Under Plan Bay Area, a much greater share of new jobs will concentrate within designated PDAs, many of which are existing employment centers. Because of the large size of the overall employment base and the Plan’s development

strategy, the distribution of jobs among counties is projected to change very little. Alameda, Solano, and Contra Costa counties are projected to experience the fastest job growth rates (roughly 36 percent each). In absolute terms Santa Clara, Alameda, and San Francisco counties will collectively absorb two-thirds of the region’s projected job growth, approximately equivalent to the current share of jobs concentrated in the three counties.

The region’s primary industrial sectors of employment are shown in Table 1. The Professional and Managerial Services sector has the highest share of jobs in the region (18 percent). Although professional services represents a substantial proportion of employment in all counties, this sector is relatively concentrated in the South Bay and San Francisco/Peninsula subregions, which have a combined 63 percent of the region’s jobs in this sector.

As the historic heart of the Bay Area, the combined city/county of San Francisco serves as a global financial center and tourist destination, providing 29 percent of regional employment in the Financial and Leasing sector and 22 percent of the Arts, Recreation, and Other Services sector. The technology-centered Silicon Valley concentrated in the South Bay, has also been a significant driver of regional economic growth, particularly in the Information, Professional, and Manufacturing sectors. About 67 percent of the region’s jobs in Manufacturing and Wholesale are located in Santa Clara and Alameda counties, while Santa Clara and San Mateo counties represent 55 percent of regional Information jobs. In addition to Silicon Valley, several clusters of Manufacturing and Technology industries exist in other parts of the East Bay and some of the North Bay counties.

The Health and Education sector, which comprises 13 percent of the Bay Area’s employment, is anchored by renowned universities and hospitals. The Retail sector also contributes to the regional economy, serving local needs as well as providing regional shopping destina-

tions. As primarily local-serving sectors, the distribution of jobs in these two categories is roughly proportional to each county's share of the regional population.

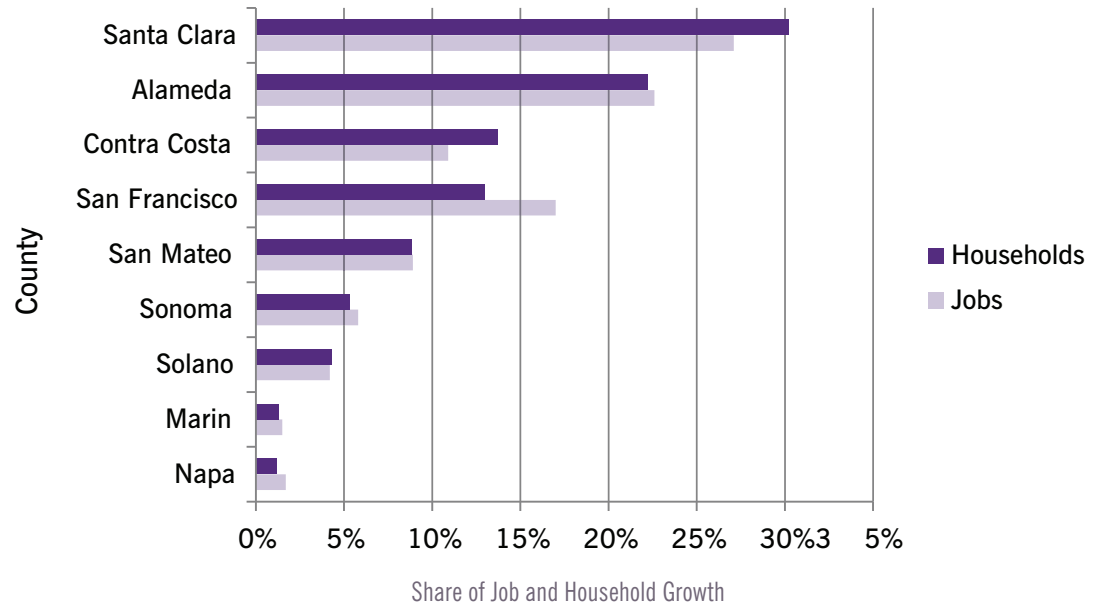
The North Bay counties have strong agricultural sectors grounded in the wine industry, although the East Bay, South Bay, and Peninsula also have important farmland. Combined, the North Bay counties represent 63 percent of employment in the Agricultural and Natural Resources sector, which represents only one percent of the region's jobs.

The Bay Area's employment in the Professional and Managerial Services sector is projected to increase by 63 percent between 2010 and 2040. While the North and East Bay are projected to experience higher rates of job growth in the Professional and Managerial Services sector (67 percent each), the South Bay and San Francisco/Peninsula subregions will accommodate a higher absolute increase, accounting for about 60 percent of new jobs in this sector.

The growth in local-serving industries will also drive recovery and expansion in the region. For example, the Health and Educational Services and Arts, Recreation, and Other Services sectors are expected to add nearly 440,000 jobs, representing 40 percent of new employment in the region. In addition, the number of jobs in the Construction sector is expected to increase by 58 percent over 2010 levels, bouncing back from the recent recession. Overall, services jobs will comprise a larger share of region-wide employment in 2040 compared to 2000. Conversely, Manufacturing and Wholesale, Retail, and Government are projected to account for a smaller share of jobs by 2040.

## POPULATION

As of 2010, the total population of the Bay Area was just over 7,150,000. There were roughly 2.6 million households in 2010 in the region and over 3.2 million employed residents. Santa Clara, Alameda,



ABAG Aggregated Industry Sectors	NAICS Sector Numbers	NAICS Sector Names
Agriculture and Natural Resources	11, 22	Agriculture, Forestry, Fishing and Hunting; Mining
Construction	23	Construction
Manufacturing and Wholesale	31-33, 42	Manufacturing; Wholesale Trade
Transportation and Utilities	22, 48-49	Utilities; Transportation and Warehousing
Retail	44-45	Retail Trade
Information	51	Information
Financial and Leasing	52, 53	Finance and Insurance; Real Estate and Rental and Leasing;
Profession and Managerial Services	54, 55, 56	Professional, Scientific, and Technical Services; and Management of Companies and Enterprises as well as Administrative, Support, Waste Management, and Remediation Services
Health and Education Services	61, 62	Educational Services; Health Care and Social Assistance
Arts, Recreation and Other	71 ,72 ,73	Arts, Entertainment, and Recreation; Accommodation and Food Services; and Other Services
Government	92	Public Administration

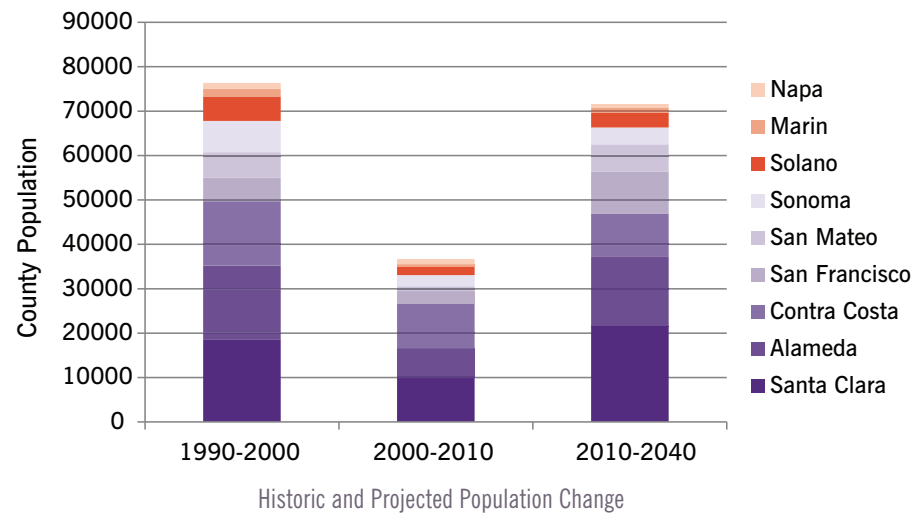
Primary Industrial Sectors of Employment for the Bay Area

and Contra Costa counties collectively represented 61 percent of the regional population.

The population of the Bay Area is projected to reach almost 9.3 million residents by 2040, growing 30 percent over 2010 levels. Projections show the number of households growing at a slightly smaller rate of 27 percent, reaching 3.3 million by 2040. The difference in population and household growth rates translates into a marginal increase in the average household size from 2.69 to 2.75 persons per household. In 2040, Santa Clara and Solano counties will continue to have the highest average household size (2.91), while San Francisco will have the lowest (2.35).

The household formation rate is based on regional-level assumptions about demographic shifts in age, ethnic profile, and other factors, combined with assumptions that household size tendencies will remain stable or shift slowly for an age and ethnic category. At the city level, however, projected changes in household population and average household size are based on the overall regional trends and the assumption that new housing will perpetuate existing household size patterns in a given location. For example, jurisdictions with lower average household sizes (i.e., Emeryville, San Francisco, Mountain View, and Sausalito) tend to have a higher share of housing units with zero or one bedroom. In reality, the average household size within a community reflects a variety of demographic characteristics such as income mix, age profile, and proportion of recent immigrants, as well as housing stock characteristics and personal preferences. These factors and the influence on household size may change over the 30 year projection period in ways that the model does not attempt to predict.

Because Plan Bay Area relies on infill strategies to absorb most of the new growth, the counties that currently have the highest populations are projected to experience the most growth in absolute and relative



terms, while the North Bay counties will experience the lowest growth. Individually, Santa Clara and San Francisco counties are projected to have the highest population growth rates (36 and 35 percent, respectively). These counties are home to the Bay Area's largest cities (San José and San Francisco), where much of the new housing will be located.

Region-wide, annual growth in population over the next three decades will be somewhat smaller than in the 1990s but substantially higher than in the first decade of the 21st century. Annual increments of population added in Contra Costa, Marin, Napa, and Sonoma will be significantly smaller than in the 1990s. Combined, the two East Bay counties of Alameda and Contra Costa will add over 767,000 residents over the next 30 years, but Alameda County will have the larger share of growth, as new households concentrate in existing urban centers. Population growth in the South Bay alone will represent 30 percent of

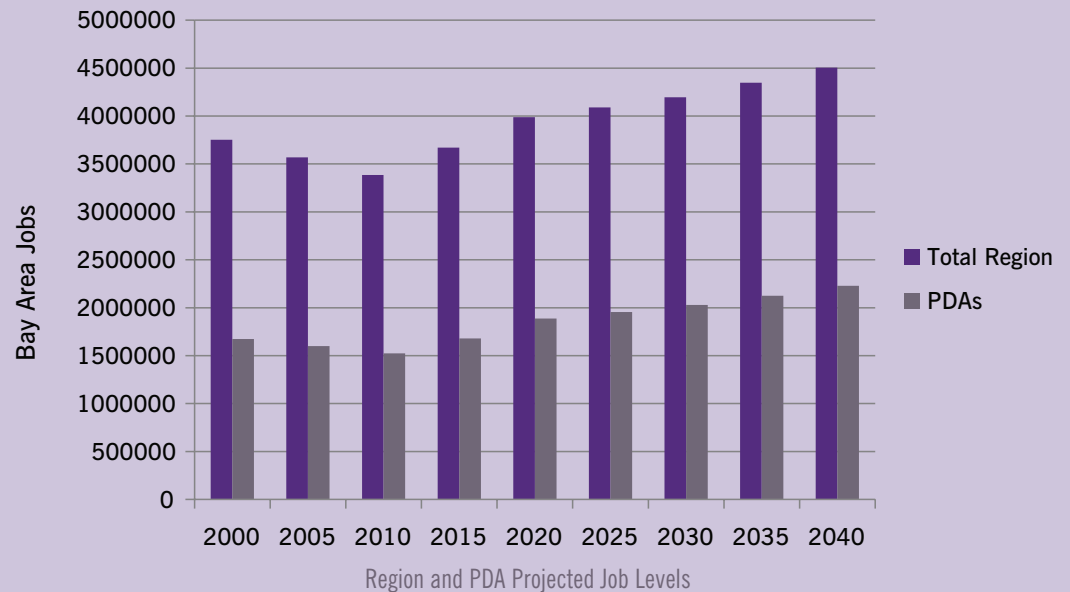
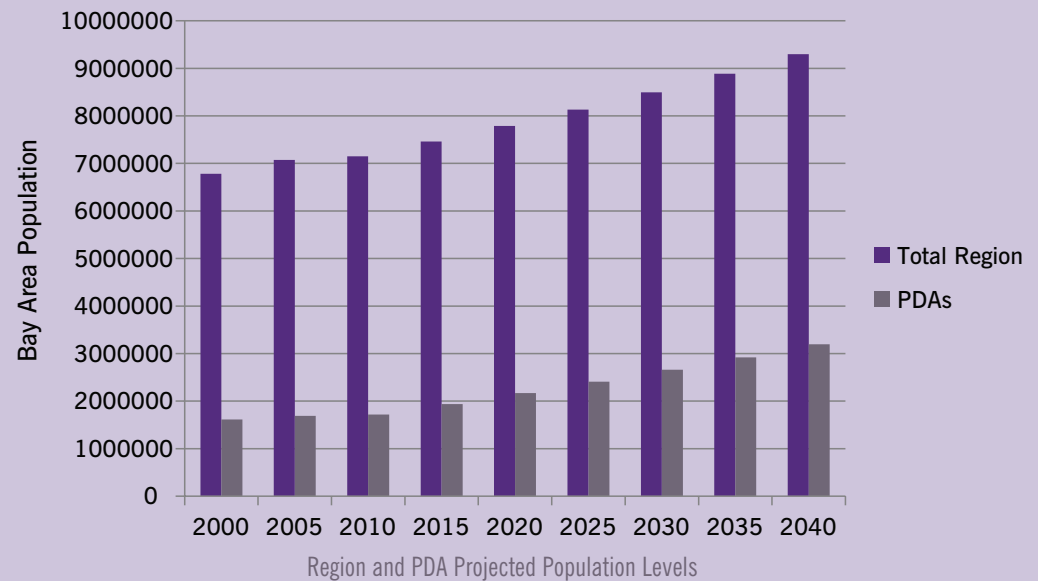
the regional growth, while the combined San Francisco/Peninsula sub-area will account for another 22 percent. Together, the four North Bay counties will add about 270,000 residents, contributing 13 percent of total population growth in the Bay Area.

Compared to job growth, population growth is expected to spread out more evenly across the projection period, growing nine percent every 10 years. In contrast, job recovery augments employment growth in the first ten years of the projection period.

## PRIORITY DEVELOPMENT AREAS

Priority Development Areas (PDAs) are the implementation framework for Plan Bay Area. PDAs are selected by local jurisdictions and represent a mix of infill locations in older cities and the creation and expansion of mixed use districts in suburban parts of the region. Focusing future growth in PDAs, which are served by one or more modes of public transit, is intended to support a wider range of transportation options, improving accessibility and reducing traffic congestion. Development in PDAs will promote “complete communities” with a range of housing options, employment opportunities, and amenities.

Plan Bay Area includes more than 170 PDAs. Most of the local governments in the Bay Area have nominated at least one PDA (71 of the 101 cities). The PDAs cover approximately 13 percent of the region’s urbanized land. It is estimated that PDAs will accommodate roughly 69 percent of the region’s population growth, 78 percent of its housing growth, and 62 percent of its job growth between 2010 and 2040. Nevertheless, jobs will remain more heavily concen-





trated in PDAs than population. The following chapters on each county describe the visions of select PDAs to provide a sense of the potential changes in housing options, employment opportunities, and transit access in communities across the Bay Area.



Downtown Berkeley-PDA Site Visit

## Bay Area Regional Projections

	2010	2015	2020	2025	2030	2035	2040
Population	7,150,739	7,461,400	7,786,800	8,134,000	8,496,800	8,889,000	9,299,100
Household Population	7,003,059	7,307,400	7,623,700	7,961,900	8,313,900	8,690,400	9,084,800
Households	2,608,023	2,720,410	2,837,680	2,952,910	3,072,920	3,188,330	3,308,090
Persons Per Household	2.69	2.69	2.69	2.70	2.71	2.73	2.75
Employed Residents	3,268,680	3,547,310	3,849,790	3,949,620	4,052,020	4,198,400	4,350,070
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	24,640	25,180	25,690	24,800	23,940	23,330	22,750
Construction	142,350	168,380	197,560	203,280	209,150	217,080	225,290
Manufacturing & Wholesale	460,170	473,360	486,720	476,580	467,010	461,330	456,080
Retail	335,930	352,550	370,260	372,210	374,060	379,210	384,420
Transportation & Utilities	98,710	108,320	119,080	120,650	122,090	124,760	127,360
Information	121,070	134,550	149,640	150,890	152,130	154,720	157,330
Financial & Leasing	186,070	204,730	225,520	226,770	227,680	230,880	233,790
Professional & Managerial Services	596,740	678,230	771,560	814,300	859,260	914,710	973,640
Health & Educational Services	447,720	497,070	553,680	584,230	616,620	656,290	698,610
Arts, Recreation & Other Services	472,930	519,020	570,160	589,000	608,420	633,960	660,570
Government	498,970	508,600	517,280	526,610	536,220	550,550	565,390
<b>Total Jobs</b>	<b>3,385,300</b>	<b>3,669,990</b>	<b>3,987,150</b>	<b>4,089,320</b>	<b>4,196,580</b>	<b>4,346,820</b>	<b>4,505,230</b>

## Total Population

	2010	2015	2020	2025	2030	2035	2040
ALAMEDA COUNTY	1,510,271	1,580,800	1,654,200	1,730,100	1,810,300	1,897,200	1,987,900
CONTRA COSTA COUNTY	1,049,025	1,085,700	1,123,500	1,172,600	1,224,400	1,280,300	1,338,400
MARIN COUNTY	252,409	256,700	261,100	266,600	272,100	278,600	285,400
NAPA COUNTY	136,484	140,300	144,200	148,600	153,100	158,400	163,700
SAN FRANCISCO COUNTY	805,235	847,000	890,400	934,800	981,800	1,032,500	1,085,700
SAN MATEO COUNTY	718,451	745,400	775,100	805,600	836,100	869,300	904,400
SANTA CLARA COUNTY	1,781,642	1,877,700	1,977,900	2,080,600	2,188,500	2,303,500	2,423,500
SOLANO COUNTY	413,344	427,300	442,700	459,200	475,200	492,700	511,600
SONOMA COUNTY	483,878	500,500	517,700	535,900	555,300	576,500	598,500
<b>REGION</b>	<b>7,150,739</b>	<b>7,461,400</b>	<b>7,786,800</b>	<b>8,134,000</b>	<b>8,496,800</b>	<b>8,889,000</b>	<b>9,299,100</b>

### METROPOLITAN STATISTICAL AREA (MSA)

NAPA	136,484	140,300	144,200	148,600	153,100	158,400	163,700
SAN FRANCISCO-OAKLAND-FREMONT	4,335,391	4,515,600	4,704,300	4,909,700	5,124,700	5,357,900	5,601,800
SAN JOSE-SUNNYVALE-SANTA CLARA*	1,781,642	1,877,700	1,977,900	2,080,600	2,188,500	2,303,500	2,423,500
SANTA ROSA-PETALUMA	483,878	500,500	517,700	535,900	555,300	576,500	598,500
VALLEJO-FAIRFIELD	413,344	427,300	442,700	459,200	475,200	492,700	511,600

\*DATA DOES NOT INCLUDE SAN BENITO COUNTY



## Households

	2010	2015	2020	2025	2030	2035	2040
ALAMEDA COUNTY	545,138	571,370	598,430	624,300	651,720	678,080	705,330
CONTRA COSTA COUNTY	375,364	387,870	400,800	416,220	432,430	448,090	464,150
MARIN COUNTY	103,210	104,650	106,170	107,610	109,100	110,540	112,050
NAPA COUNTY	48,876	50,100	51,370	52,560	53,840	55,050	56,310
SAN FRANCISCO COUNTY	345,811	362,440	379,600	396,000	413,370	430,070	447,350
SAN MATEO COUNTY	257,837	267,150	277,200	286,790	296,280	305,390	315,100
SANTA CLARA COUNTY	604,204	639,160	675,670	710,610	747,070	782,120	818,400
SOLANO COUNTY	141,758	146,140	151,010	155,710	160,030	164,160	168,700
SONOMA COUNTY	185,825	191,530	197,430	203,110	209,080	214,830	220,700
<b>REGION</b>	<b>2,608,023</b>	<b>2,720,410</b>	<b>2,837,680</b>	<b>2,952,910</b>	<b>3,072,920</b>	<b>3,188,330</b>	<b>3,308,090</b>
<b>METROPOLITAN STATISTICAL AREA (MSA)</b>							
NAPA	48,876	50,100	51,370	52,560	53,840	55,050	56,310
SAN FRANCISCO-OAKLAND-FREMONT	1,627,360	1,693,480	1,762,200	1,830,920	1,902,900	1,972,170	2,043,980
SAN JOSE-SUNNYVALE-SANTA CLARA*	604,204	639,160	675,670	710,610	747,070	782,120	818,400
SANTA ROSA-PETALUMA	185,825	191,530	197,430	203,110	209,080	214,830	220,700
VALLEJO-FAIRFIELD	141,758	146,140	151,010	155,710	160,030	164,160	168,700

\*DATA DOES NOT INCLUDE SAN BENITO COUNTY

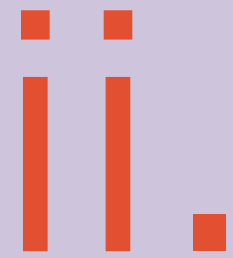
## Total Jobs

	2010	2015	2020	2025	2030	2035	2040
ALAMEDA COUNTY	694,460	757,010	826,790	850,610	875,390	910,650	947,650
CONTRA COSTA COUNTY	344,920	374,610	407,810	420,060	432,730	449,640	467,390
MARIN COUNTY	110,730	115,220	119,990	121,870	123,820	126,350	129,150
NAPA COUNTY	70,660	75,700	81,240	82,740	84,300	86,880	89,540
SAN FRANCISCO COUNTY	568,720	617,420	671,230	689,080	707,670	732,970	759,500
SAN MATEO COUNTY	345,190	374,940	407,550	414,240	421,500	432,980	445,070
SANTA CLARA COUNTY	926,270	1,003,780	1,091,270	1,118,320	1,147,020	1,187,010	1,229,520
SOLANO COUNTY	132,340	143,130	155,130	160,160	165,410	172,470	179,940
SONOMA COUNTY	192,010	208,180	226,140	232,240	238,740	247,870	257,470
<b>REGION</b>	<b>3,385,300</b>	<b>3,669,990</b>	<b>3,987,150</b>	<b>4,089,320</b>	<b>4,196,580</b>	<b>4,346,820</b>	<b>4,505,230</b>

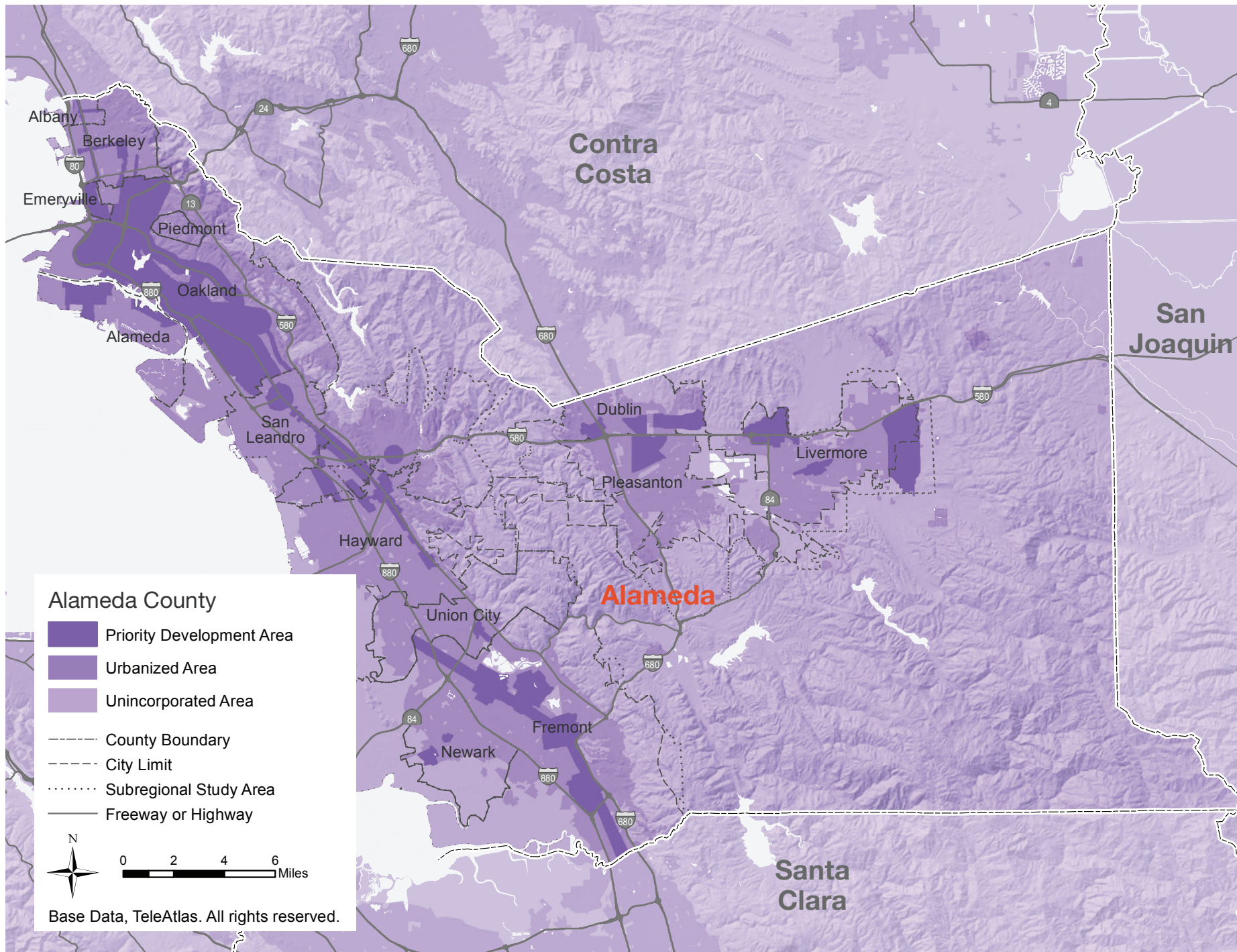
### METROPOLITAN STATISTICAL AREA (MSA)

NAPA	70,660	75,700	81,240	82,740	84,300	86,880	89,540
SAN FRANCISCO-OAKLAND-FREMONT	2,064,020	2,239,200	2,433,370	2,495,860	2,561,110	2,652,590	2,748,760
SAN JOSE-SUNNYVALE-SANTA CLARA*	926,270	1,003,780	1,091,270	1,118,320	1,147,020	1,187,010	1,229,520
SANTA ROSA-PETALUMA	192,010	208,180	226,140	232,240	238,740	247,870	257,470
VALLEJO-FAIRFIELD	132,340	143,130	155,130	160,160	165,410	172,470	179,940

\*DATA DOES NOT INCLUDE SAN BENITO COUNTY



Alameda  
County





# Alameda County

Alameda County is one of the Bay Area's older counties, as most of its jurisdictions were incorporated prior to World War II. Given its relative age, most city centers are characterized by relatively compact street grids. Traditionally, the county's economy has been based on manufacturing, transportation, wholesale and retail trade, and government services. In the 21st century the county continues to be a transportation hub because of its regional central location, Oakland's deep water port, and numerous commuter and freight rail connections.

Alameda County is projected to grow significantly, taking on about 23 percent of the region's total household and job growth. New development is poised to take advantage of the county's connectivity via 43 PDAs located primarily along major transportation corridors and at transit nodes.

Alameda County is diverse both in population and in the size of its communities. Reflecting these differences, we describe the county in terms of four geographic areas: North (Alameda, Albany, Berkeley, Emeryville, and Oakland); Central (Hayward, San Leandro, and unincorporated communities); South (Fremont, Newark, and Union City), and East (Dublin, Livermore, and Pleasanton). All of these subareas have PDAs, which vary substantially in size and development density and intensity.



Downtown Oakland- Latham Square

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## ECONOMY

Alameda County's economy has capitalized on its access to railroads and ports, developing transportation and manufacturing industries through the 20th century. The Manufacturing and Wholesale sector still makes up 15 percent of the county's jobs. In recent decades, the manufacturing sector has generally shifted away from goods production towards administrative, research and development, and marketing functions. The University of California is the largest employer in the county, education and research important economic drivers. The largest share of the county's employment is the Government sector with 19 percent of total jobs, including federal, state and regional agencies as local government districts, as well as state funded higher education institutions.

Employment in Alameda County is projected to increase by 253,000 jobs between 2010 and 2040, a 36 percent increase. The Professional and Managerial Services sector has the most absolute and percentage growth, adding 74,000 new jobs for a 66 percent increase. The Construction industry will also experience high growth during the projection period (65 percent), a portion of which are replacement jobs from those lost in the Great Recession.

It is anticipated that all cities in the county will experience job increases of 25 percent or more between 2010 and 2040. Dublin and Emeryville are expected to have the largest percentage growth in jobs, while Oakland, Hayward, Fremont, and Berkeley will accommodate the greatest absolute number of jobs.

## POPULATION

The population of Alameda County is projected to grow by 32 percent, reaching a total of nearly 2 million people by 2040. With the exception of Piedmont, all cities in the county will increase in population by at least 19 percent. The number of households is projected to in-

crease by 29 percent to just over 700,000 in 2040. Similar to job growth, Dublin and Emeryville have the largest percentage increases in both population and households. Oakland, Fremont, and Hayward will continue to have the largest populations and largest absolute growth in the county.

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## PRIORITY DEVELOPMENT AREAS

There are 43 Priority Development Areas (PDAs) in Alameda County, including at least one in every city except for Piedmont and four in the unincorporated area between San Leandro and Hayward. Combined, the PDAs are projected to accommodate 78 percent of the county's household growth and 70 percent of job growth by 2040. The county's PDAs include all of the BART stations, many of the downtowns, and transit nodes along the major bus corridors, making all of the PDAs accessible by one or more transit mode.

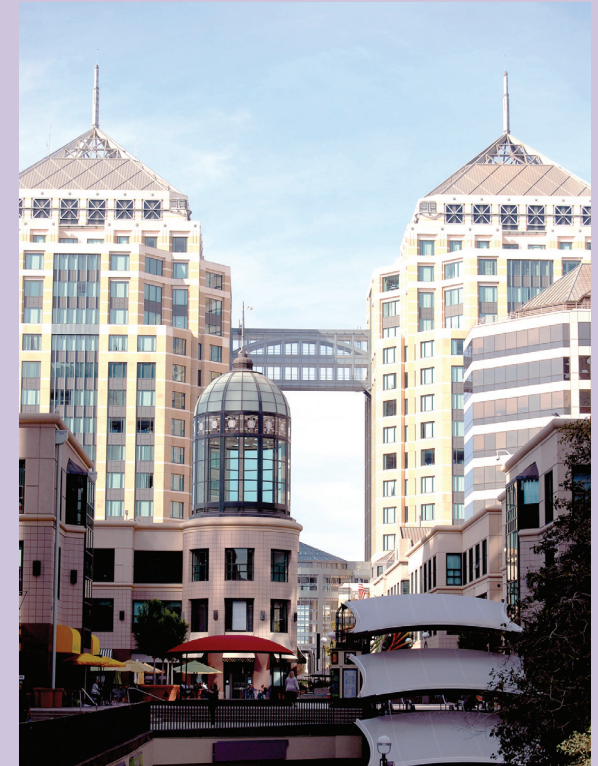
The PDAs vary in size, land use pattern, transportation infrastructure, and growth opportunities. For example, PDAs in the more urban North County have higher densities than the more suburban South County and East County PDAs. Intensifying development in the East and South County PDAs will cause a more noticeable change relative to existing land use patterns. However, two-thirds of the county's PDAs are located in North and Central County, which are projected to accommodate the majority of growth (74 percent of new households and 68 percent of

new jobs).

### North County

Oakland is projected to add approximately 160,000 new residents and 85,000 jobs by 2040, representing nearly one-third of the county's population and job growth. Nearly all of this development will occur within Oakland's seven PDAs, particularly around the BART stations, West Oakland, and along the city's major corridors such as International Boulevard and San Pablo Avenue. The Downtown/Jack London PDA, designated as a Regional Center, is projected to accommodate almost 40,000 new jobs and 15,000 new households.

By 2040, it is anticipated that Emeryville's population will more than double and the number of jobs will increase by 47 percent, with much of the growth occurring in the first 15 years. Nearly the entire city is designated as a PDA, indicating the desire for increased housing options, amenities, and employment opportunities throughout the mixed-use community of Emeryville.



Downtown Oakland PDA



The city of Alameda, which is projected to add over 21,000 residents, is planning to accommodate about 73 percent of new households and 90 percent of new jobs within its two PDAs, including the former Naval Air Station site.

Berkeley's population is projected to grow by more than 27,000 people, a 24 percent increase from 2010. Over 22,000 new jobs are anticipated for the city, of which about 9,700 will occur in PDAs. Approximately 64 percent of new households will be located in PDAs, which include Downtown and major transportation corridors such as Telegraph Avenue, University Avenue, and Shattuck Avenue.

## Central and South County

The city of Fremont is projected to add over 60,000 residents, increasing by 29 percent over 2010. Fremont is also expected to accommodate about 30,000 new jobs. About 75 percent of job growth and 65 percent of household growth will occur in Fremont's four PDAs, which cover the city center as well as existing and planned BART stations.



Union City- PDA



Downtown Hayward- PDA



Hayward and Newark are projected to experience population growth rates of 30 and 35 percent, respectively, while Union City is expected to grow by 19 percent. In Hayward, new development in PDAs will help create a vibrant mixed-use corridor along Mission Boulevard, connecting downtown and the BART stations. About 74 percent of new households are planned for Newark's two PDAs. Union City has designated its city center and BART station area as a PDA, which will accommodate roughly half of the city's job growth and a quarter of new households.

## East County

The East County cities are projected to experience relatively high growth, adding a combined 72,000 new residents and 45,000 new jobs by 2040. Dublin will lead this growth, increasing in population by 60 percent and in jobs by 88 percent. With the exception of one Transit Town Center place type, all of the East County PDAs are classified as Suburban Centers. Dublin and Livermore

plan to accommodate the majority of new jobs in their PDAs (89 and 76 percent, respectively).



Livermore- PDA

## Alameda County Projections

	2010	2015	2020	2025	2030	2035	2040
Population	1,510,271	1,580,800	1,654,200	1,730,100	1,810,300	1,897,200	1,987,900
Household Population	1,472,829	1,541,900	1,612,900	1,686,800	1,764,700	1,847,900	1,934,600
Households	545,138	571,370	598,430	624,300	651,720	678,080	705,330
Persons Per Household	2.70	2.70	2.70	2.70	2.71	2.73	2.74
Employed Residents	669,770	728,760	792,510	813,630	835,770	866,940	899,070
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	880	900	910	880	840	830	800
Construction	31,700	38,170	45,440	46,860	48,320	50,290	52,340
Manufacturing & Wholesale	104,510	107,520	110,530	109,320	108,100	107,820	107,560
Retail	65,240	69,970	75,040	75,580	76,130	77,600	79,080
Transportation & Utilities	26,020	30,120	34,620	35,260	35,890	36,990	38,110
Information	15,270	16,220	17,220	17,310	17,390	17,580	17,750
Financial & Leasing	28,810	34,140	40,310	40,660	40,940	41,850	42,720
Professional & Managerial Services	112,220	127,990	146,680	155,060	163,950	174,840	186,490
Health & Educational Services	95,550	104,010	113,440	118,660	124,090	130,830	137,970
Arts, Recreation & Other Services	84,080	93,090	103,020	106,690	110,470	115,440	120,620
Government	130,180	134,880	139,580	144,330	149,270	156,580	164,210
<b>Total Jobs</b>	<b>694,460</b>	<b>757,010</b>	<b>826,790</b>	<b>850,610</b>	<b>875,390</b>	<b>910,650</b>	<b>947,650</b>

## Total Population

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
ALAMEDA	73,812	77,000	80,300	83,800	87,500	91,400	95,500
ALBANY	18,539	19,100	19,700	20,400	21,000	21,800	22,500
BERKELEY	112,580	116,600	120,700	124,900	129,200	134,600	140,100
DUBLIN	46,036	50,000	54,200	58,700	63,500	68,500	73,800
EMERYVILLE	10,080	11,800	13,500	15,300	17,100	19,000	21,000
FREMONT	214,089	223,200	232,700	242,500	252,800	263,900	275,500
HAYWARD	144,186	150,700	157,500	164,400	171,800	179,700	188,000
LIVERMORE	80,968	84,400	88,000	91,700	95,600	99,900	104,300
NEWARK	42,573	44,800	47,200	49,600	52,100	54,800	57,600
OAKLAND	390,724	414,700	439,600	464,900	492,100	520,900	551,100
PIEDMONT	10,667	10,700	10,800	11,000	11,000	11,100	11,300
PLEASANTON	70,285	73,500	76,800	80,200	83,900	87,800	91,800
SAN LEANDRO	84,950	88,300	91,700	95,300	99,200	103,300	107,600
UNION CITY	69,516	71,400	73,400	75,500	77,600	80,000	82,500
UNINCORPORATED	141,266	144,600	148,100	151,900	155,900	160,500	165,300
<b>ALAMEDA COUNTY</b>	<b>1,510,271</b>	<b>1,580,800</b>	<b>1,654,200</b>	<b>1,730,100</b>	<b>1,810,300</b>	<b>1,897,200</b>	<b>1,987,900</b>

## Households

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
ALAMEDA	30,123	31,180	32,270	33,310	34,410	35,480	36,570
ALBANY	7,401	7,620	7,840	8,060	8,290	8,510	8,740
BERKELEY	46,029	47,660	49,350	50,960	52,660	54,290	55,980
DUBLIN	14,913	16,340	17,800	19,200	20,690	22,130	23,610
EMERYVILLE	5,694	6,660	7,660	8,610	9,630	10,610	11,620
FREMONT	71,004	73,970	77,030	79,960	83,050	86,020	89,090
HAYWARD	45,365	47,570	49,860	52,040	54,350	56,560	58,850
LIVERMORE	29,134	30,740	32,390	33,970	35,650	37,270	38,940
NEWARK	12,972	13,570	14,190	14,780	15,410	16,010	16,640
OAKLAND	153,791	163,400	173,270	182,710	192,790	202,490	212,470
PIEDMONT	3,801	3,820	3,850	3,880	3,880	3,880	3,890
PLEASANTON	25,245	26,400	27,590	28,730	29,940	31,100	32,300
SAN LEANDRO	30,717	31,970	33,270	34,510	35,820	37,080	38,390
UNION CITY	20,433	20,960	21,520	22,050	22,590	23,100	23,650
UNINCORPORATED	48,516	49,510	50,540	51,530	52,560	53,550	54,590
<b>ALAMEDA COUNTY</b>	<b>545,138</b>	<b>571,370</b>	<b>598,430</b>	<b>624,300</b>	<b>651,720</b>	<b>678,080</b>	<b>705,330</b>

Total Jobs	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
ALAMEDA	24,070	26,420	28,770	29,670	30,590	31,910	33,220
ALBANY	4,230	4,560	4,930	5,070	5,220	5,410	5,630
BERKELEY	77,110	82,130	87,530	89,900	92,340	95,780	99,330
DUBLIN	16,810	19,930	24,100	25,620	27,270	29,360	31,650
EMERYVILLE	16,070	17,940	20,080	20,790	21,520	22,540	23,610
FREMONT	90,010	97,850	106,540	109,130	111,820	115,810	120,000
HAYWARD	68,140	73,320	78,910	80,610	82,360	85,040	87,820
LIVERMORE	38,450	42,280	46,550	47,860	49,240	51,170	53,210
NEWARK	17,930	19,310	20,840	21,280	21,720	22,420	23,150
OAKLAND	190,490	210,780	233,630	242,030	250,800	262,950	275,760
PIEDMONT	1,930	2,040	2,150	2,210	2,260	2,330	2,410
PLEASANTON	54,340	58,520	63,050	64,320	65,620	67,600	69,640
SAN LEANDRO	39,980	43,410	47,150	48,260	49,410	51,120	52,920
UNION CITY	20,600	21,990	23,500	23,890	24,310	24,990	25,700
UNINCORPORATED	34,300	36,530	39,060	39,970	40,910	42,220	43,600
<b>ALAMEDA COUNTY</b>	<b>694,460</b>	<b>757,010</b>	<b>826,790</b>	<b>850,610</b>	<b>875,390</b>	<b>910,650</b>	<b>947,650</b>

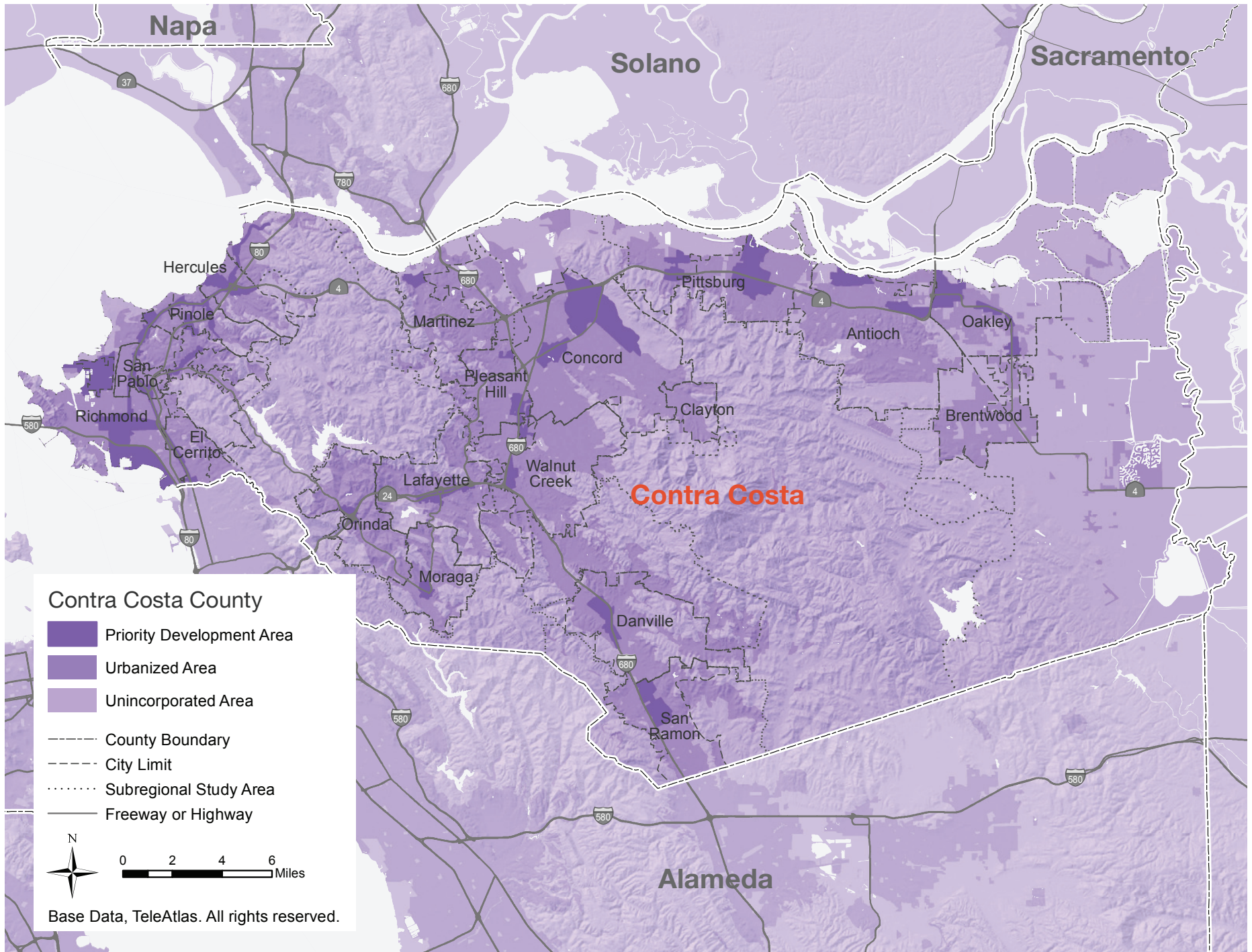
Alameda County Priority Development Areas	Place Type	Population		Households		Jobs	
		2010	2040	2010	2040	2010	2040
Alameda Naval Air Station	Transit Town Center	3,430	16,370	1,090	5,040	1,220	8,420
Alameda Northern Waterfront	Transit Neighborhood	2,420	4,460	990	1,760	2,440	3,440
Albany San Pablo Avenue & Solano Avenue	Mixed-Use Corridor	4,070	4,910	1,690	1,970	1,920	2,440
Berkeley Adeline Street	Mixed-Use Corridor	1,580	2,360	620	900	950	1,630
Berkeley Downtown	City Center	5,300	13,890	2,570	6,670	15,210	21,600
Berkeley San Pablo Avenue *	Mixed-Use Corridor	3,080	5,160	1,440	2,340	2,400	3,340
Berkeley South Shattuck	Mixed-Use Corridor	720	1,050	310	440	1,150	1,450
Berkeley Telegraph Avenue	Mixed-Use Corridor	2,080	3,050	990	1,400	1,740	2,560
Berkeley University Avenue *	Mixed-Use Corridor	2,920	4,250	1,390	1,940	1,410	1,990
Dublin Downtown Specific Plan Area	Suburban Center	1,860	4,210	790	1,750	4,460	5,950
Dublin Transit Center	Suburban Center	1,350	8,340	620	3,720	0	9,030
Dublin Town Center	Suburban Center	8,970	14,250	3,750	5,770	310	3,010
Emeryville Mixed-Use Core	City Center	6,150	16,710	3,530	9,300	11,280	18,450
Fremont Centerville	Transit Neighborhood	30,100	38,970	10,360	12,990	4,030	4,470
Fremont City Center	City Center	17,320	25,890	6,870	9,910	18,770	24,660
Fremont Irvington District	Transit Town Center	19,860	29,650	6,910	9,990	5,470	5,650
Fremont South Fremont/Warm Springs	Suburban Center	6,460	15,680	2,180	5,150	12,890	28,980
Hayward The Cannery	Transit Neighborhood	910	3,090	330	1,070	1,450	2,320
Hayward Downtown	City Center	4,630	12,100	2,100	5,370	6,300	9,270
Hayward South Hayward BART	Mixed-Use Corridor	610	4,930	170	1,330	320	810
Hayward South Hayward BART	Urban Neighborhood	4,540	12,470	1,660	4,400	470	1,610
Hayward Mission Corridor	Mixed-Use Corridor	3,250	8,610	1,230	3,210	1,700	2,830
Livermore Downtown	Suburban Center	1,710	5,100	920	2,620	2,880	3,710
Livermore East Side	Suburban Center	170	9,090	90	4,280	16,370	24,360
Livermore Isabel Avenue/BART Station Planning Area	Suburban Center	980	8,670	470	3,910	3,300	8,500
Newark Dumbarton Transit Oriented Development	Transit Town Center	530	9,990	140	2,500	860	2,100
Newark Old Town Mixed Use Area	Transit Neighborhood	1,660	2,840	580	940	180	390
Oakland Transit Oriented Development Corridors	Mixed-Use Corridor	154,370	194,230	60,970	74,320	33,560	41,830
Oakland Coliseum BART Station Area	Transit Town Center	11,910	36,940	3,440	10,420	5,160	12,430
Oakland Downtown & Jack London Square	Regional Center	19,060	45,880	10,630	25,390	88,260	127,710
Oakland Eastmont Town Center	Urban Neighborhood	17,270	20,490	5,960	6,840	3,460	5,320
Oakland Fruitvale & Dimond Areas	Urban Neighborhood	42,350	61,130	12,840	17,820	8,150	15,700
Oakland MacArthur Transit Village	Urban Neighborhood	16,930	29,380	8,030	13,410	10,600	12,880
Oakland West Oakland	Transit Town Center	23,960	46,110	9,030	16,940	7,440	14,910
Pleasanton Hacienda	Suburban Center	3,160	12,420	1,270	4,800	9,910	15,330
San Leandro Bay Fair BART Transit Village	Transit Town Center	1,530	3,920	630	1,520	1,440	2,700
San Leandro East 14th Street *	Mixed-Use Corridor	8,120	11,060	3,490	4,610	9,010	15,680
San Leandro Downtown Transit Oriented Development *	City Center	9,390	19,030	3,930	7,690	2,790	2,840
Union City Intermodal Station District	City Center	2,890	5,250	1,030	1,810	340	2,810
Alameda County Unincorporated Castro Valley BART	Transit Neighborhood	3,440	5,320	1,400	2,090	2,020	2,980
Alameda County Unincorporated East 14th Street and Mission Street	Mixed-Use Corridor	19,350	26,070	6,740	8,800	2,740	4,250
Alameda County Unincorporated Hesperian Boulevard	Transit Neighborhood	8,730	11,420	2,740	3,450	1,860	2,600
Alameda County Unincorporated Meekland Avenue Corridor	Transit Neighborhood	4,530	6,490	1,300	1,790	900	1,330

\* Indicates PDAs that overlap within a jurisdiction. Job totals for the overlapping areas are assigned to one PDA only, with no duplicate counts



Contra Costa  
County





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# Contra Costa County

With over one million residents, Contra Costa County is the third most populous county in the Bay Area, following Alameda and Santa Clara. The county is often divided into three geographic subareas: West (El Cerrito, Hercules, Pinole, Richmond, San Pablo, Rodeo-Crockett); Central (Clayton, Concord, Danville, Lafayette, Martinez, Moraga, Orinda, Pleasant Hill, San Ramon, Walnut Creek, Alamo-Blackhawk); and East (Antioch, Brentwood, Oakley, Pittsburg).

Much of the county is characterized by an auto-oriented, suburban land use pattern resulting from growth spurts during the 1940s and then again from the 1980s through early 2000. West County cities have the most urban character and industrial uses. Cities in Central County began as rail depots serving nearby farmland, but emerged as bedroom communities after the postwar era. Much of the county's most recent population growth took place in the eastern portion of the county.

Contra Costa County is projected to take on about 13 percent of the region's total household growth and 11 percent of job growth between 2010 and 2040. It currently has 38 PDAs, which are well-served by a variety of transit services, including BART, Capitol Corridor, and AC Transit, WestCAT, and Central Contra Costa Transit.



Walnut Creek



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## ECONOMY

West County developed around manufacturing, processing, and refining industries. Several Central County cities such as Walnut Creek and San Ramon have transformed into regional job centers based largely on office and commercial businesses. East County's economy is generally based on local-serving uses. AT&T Corporation and Summerville Management LLC (which provides nursing care facilities) are the largest employers in the county.

In 2010, the Government sector had the highest share of jobs in Contra Costa County (16 percent), followed by Health and Educational Services (15 percent). Although the county currently has a relatively low share of employment in Professional and Managerial Services (14 percent compared to 18 percent region wide), this sector is projected to experience the highest job growth over the next 30 years (a 69 percent increase) and account for 28 percent of new jobs in the county in 2040. The majority of the new finance and professional service jobs are expected to locate in Central County, although Richmond and Antioch could also see substantial increases.

By 2040, the number of jobs in the county is projected to increase by 122,000, or 36 percent, one of the highest growth rates in the Bay Area. It is anticipated that all cities in the county will have job increases of 23 percent or more between 2010 and 2040. The number of jobs in Oakley (East) and Hercules (West) is anticipated to grow by the largest percentages (78 and 65 percent, respectively), although Concord and Walnut Creek will add the most jobs in absolute terms (nearly 37,500).

## POPULATION

The 10 cities in the Central County subarea currently comprise 42 percent of the county's total population, while unincorporated areas contribute 15 percent. As of 2010, Concord had the largest popula-

tion with over 122,000 residents, whereas the adjacent town of Clayton had the smallest population (10,897). The cities of Richmond and Antioch each have more than 100,000 residents and are expected to remain as the second and third most populous cities in the county through 2040.

The population of Contra Costa County is estimated to grow by 28 percent, reaching a total population of 1.3 million people by 2040. In 10 of the 19 cities, the population is projected to grow by more than 20 percent over 2010 levels. Given that the higher growth cities are evenly distributed among the three subareas, the population distribution throughout the county is not expected to change substantially. As with jobs, Hercules (West), Oakley (East), and Concord (Central) are predicted to experience the highest population growth rates (64, 56, and 49 percent, respectively). Clayton and Danville are projected to increase at the lowest population growth rates (7 and 12 percent, respectively)



Walnut Creek

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## PRIORITY DEVELOPMENT AREAS

There are 38 Priority Development Areas (PDAs) in Contra Costa County, including at least one in each of the county's cities with the exception of Clayton and Brentwood. Combined, the PDAs are projected to accommodate about 60 percent of the county's household growth and 57 percent of job growth by 2040.

### West County

Between 2010 and 2040, Hercules, Richmond, and San Pablo are projected to grow by the largest percentage of the West County cities, adding a combined 18,000 households and 16,000 jobs to the subarea. Most of this growth will occur in the PDAs, creating a series of pedestrian-friendly, transit-oriented, and mixed-use neighborhoods with a range of housing options. Hercules and Richmond are also planning for revitalization of waterfront districts.

Pinole and El Cerrito have each designated PDAs to accommodate the majority of projected growth. For

example, the Old Town districts and Appian Way corridor in Pinole will accommodate 78 percent of the over 1,700 new jobs anticipated in the city. El Cerrito seeks to develop an attractive, thriving corridor along San Pablo Avenue, with nodes of medium- to high-density residential uses.

### Central County

The population of Concord is projected to grow by 49 percent between 2010 and 2040, most of which will occur after 2020. With over 180,000 residents, it would remain the county's largest city. Nearly all of the projected housing and job growth is intended to occur within the city's two PDAs. In addition to the Downtown PDA, Concord is planning for a new Regional Center at the former Concord Naval Weapons station, accommodating over 17,000 jobs and 12,000 homes.

San Ramon and Walnut Creek are also expected to experience substantial growth, together adding about 13,500 households and 30,000 jobs by 2040. San Ramon's PDAs take advantage of new develop-



Central Richmond- PDA

ment at the City Center and the North Camino Ramon area including a new lifestyle mixed use development, a new civic center, as well as a new transit hub. Walnut Creek's PDA is intended to support new housing development in proximity to the BART station and its thriving, walkable downtown.

## East County

It is anticipated that East County will accommodate nearly 18,000 new jobs by 2040, representing a 39 percent increase for the subarea. Approximately 32 percent of all jobs are projected to be in health, education, arts, recreation, and other services, responding to demand for local services from the growing population. The number of households is projected to increase at a lower rate (28 percent), which will help create a better jobs/housing balance for the communities.

About 95 percent of new jobs anticipated for the city of Oakley between 2010 and 2040 will occur in its three PDAs, particularly within its Employment Focus PDA adjacent to the delta. Similarly, 83 percent of



Hercules Waterfront District- PDA



Hercules Waterfront District- PDA



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new households in Pittsburg are planned for downtown and in the vicinity of the future Railroad Avenue eBART station and the current Pittsburg Baypoint BART station.

Antioch is projected to add over 6,500 households and 6,400 jobs by 2040, most of which will be located within its two PDAs. The city of Antioch envisions the PDA for the Hillcrest eBART Station area to include a mix of uses and amenities that will make it a signature district of the city. The vision for the Rivertown Waterfront PDA is to restore downtown as a vibrant community gathering place, supporting residents and attracting visitors.



Pleasant Hill

## Contra Costa County Projections

	2010	2015	2020	2025	2030	2035	2040
Population	1,049,025	1,085,700	1,123,500	1,172,600	1,224,400	1,280,300	1,338,400
Household Population	1,038,711	1,074,900	1,112,000	1,160,500	1,211,300	1,266,200	1,323,200
Households	375,364	387,870	400,800	416,220	432,430	448,090	464,150
Persons Per Household	2.77	2.77	2.77	2.79	2.80	2.83	2.85
Employed Residents	455,540	489,750	526,530	539,360	552,720	572,170	592,060
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	990	1,010	1,020	990	960	930	890
Construction	21,400	25,220	29,490	30,320	31,190	32,350	33,550
Manufacturing & Wholesale	27,980	28,780	29,600	30,040	30,520	31,140	31,840
Retail	44,440	45,270	46,120	46,230	46,290	46,560	46,820
Transportation & Utilities	8,850	9,440	10,060	10,150	10,240	10,400	10,560
Information	10,790	11,450	12,140	12,200	12,260	12,380	12,500
Financial & Leasing	27,270	31,320	35,970	36,220	36,440	37,130	37,790
Professional & Managerial Services	49,410	56,730	65,220	69,110	73,150	78,170	83,520
Health & Educational Services	52,680	58,780	65,750	69,520	73,510	78,400	83,600
Arts, Recreation & Other Services	47,600	52,060	56,990	58,810	60,680	63,150	65,720
Government	53,510	54,550	55,450	56,470	57,490	59,030	60,600
<b>Total Jobs</b>	<b>344,920</b>	<b>374,610</b>	<b>407,810</b>	<b>420,060</b>	<b>432,730</b>	<b>449,640</b>	<b>467,390</b>



## Total Population

## Jurisdictional Boundary

	2010	2015	2020	2025	2030	2035	2040
ANTIOCH	102,372	105,600	108,900	112,400	116,200	120,300	124,600
BRENTWOOD	51,481	52,700	54,000	55,400	56,800	58,400	60,100
CLAYTON	10,897	10,900	11,100	11,400	11,400	11,500	11,600
CONCORD	122,067	125,300	128,500	141,100	154,000	167,500	181,500
DANVILLE	42,039	42,700	43,500	44,400	45,100	46,100	47,100
EL CERRITO	23,549	24,100	24,700	25,300	26,000	26,700	27,500
HERCULES	24,060	26,500	28,900	31,300	34,000	36,700	39,500
LAFAYETTE	23,893	24,500	25,100	25,700	26,400	27,100	27,900
MARTINEZ	35,824	36,500	37,100	38,000	38,800	39,800	40,800
MORAGA	16,016	16,400	16,900	17,300	17,800	18,400	19,000
OAKLEY	35,432	38,500	41,600	44,700	48,200	51,700	55,400
ORINDA	17,643	18,000	18,400	18,800	19,200	19,700	20,200
PINOLE	18,390	18,900	19,500	20,100	20,700	21,400	22,200
PITTSBURG	63,264	67,600	72,000	76,500	81,300	86,400	91,600
PLEASANT HILL	33,152	33,800	34,400	35,100	35,900	36,800	37,700
RICHMOND	103,701	109,100	114,600	120,300	126,500	133,100	140,100
SAN PABLO	29,139	30,300	31,500	32,800	34,200	35,700	37,200
SAN RAMON	72,148	74,400	76,800	79,400	82,300	85,500	88,800
WALNUT CREEK	64,173	67,000	69,900	72,900	76,100	79,600	83,100
UNINCORPORATED	159,785	162,900	166,100	169,700	173,500	177,900	182,500
<b>CONTRA COSTA COUNTY</b>	<b>1,049,025</b>	<b>1,085,700</b>	<b>1,123,500</b>	<b>1,172,600</b>	<b>1,224,400</b>	<b>1,280,300</b>	<b>1,338,400</b>

Households	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
ANTIOCH	32,252	33,320	34,420	35,470	36,600	37,680	38,790
BRENTWOOD	16,494	16,850	17,230	17,600	17,960	18,310	18,690
CLAYTON	4,006	4,010	4,080	4,150	4,150	4,150	4,150
CONCORD	44,278	45,380	46,500	50,630	54,840	59,000	63,190
DANVILLE	15,420	15,660	15,940	16,210	16,440	16,660	16,920
EL CERRITO	10,142	10,370	10,610	10,840	11,080	11,320	11,560
HERCULES	8,115	8,860	9,620	10,340	11,140	11,910	12,690
LAFAYETTE	9,223	9,450	9,690	9,920	10,170	10,400	10,640
MARTINEZ	14,287	14,520	14,760	14,990	15,230	15,450	15,690
MORAGA	5,570	5,700	5,830	5,960	6,090	6,220	6,350
OAKLEY	10,727	11,660	12,610	13,520	14,520	15,470	16,440
ORINDA	6,553	6,680	6,820	6,940	7,080	7,210	7,340
PINOLE	6,775	6,970	7,170	7,360	7,570	7,770	7,970
PITTSBURG	19,527	20,840	22,180	23,460	24,840	26,160	27,510
PLEASANT HILL	13,708	13,930	14,160	14,380	14,610	14,830	15,060
RICHMOND	36,093	37,890	39,730	41,490	43,390	45,220	47,090
SAN PABLO	8,761	9,130	9,510	9,880	10,270	10,650	11,030
SAN RAMON	25,284	26,180	27,090	27,960	28,900	29,800	30,730
WALNUT CREEK	30,443	31,770	33,130	34,430	35,810	37,140	38,520
UNINCORPORATED	57,706	58,700	59,720	60,690	61,740	62,740	63,790
<b>CONTRA COSTA COUNTY</b>	<b>375,364</b>	<b>387,870</b>	<b>400,800</b>	<b>416,220</b>	<b>432,430</b>	<b>448,090</b>	<b>464,150</b>

## Total Jobs

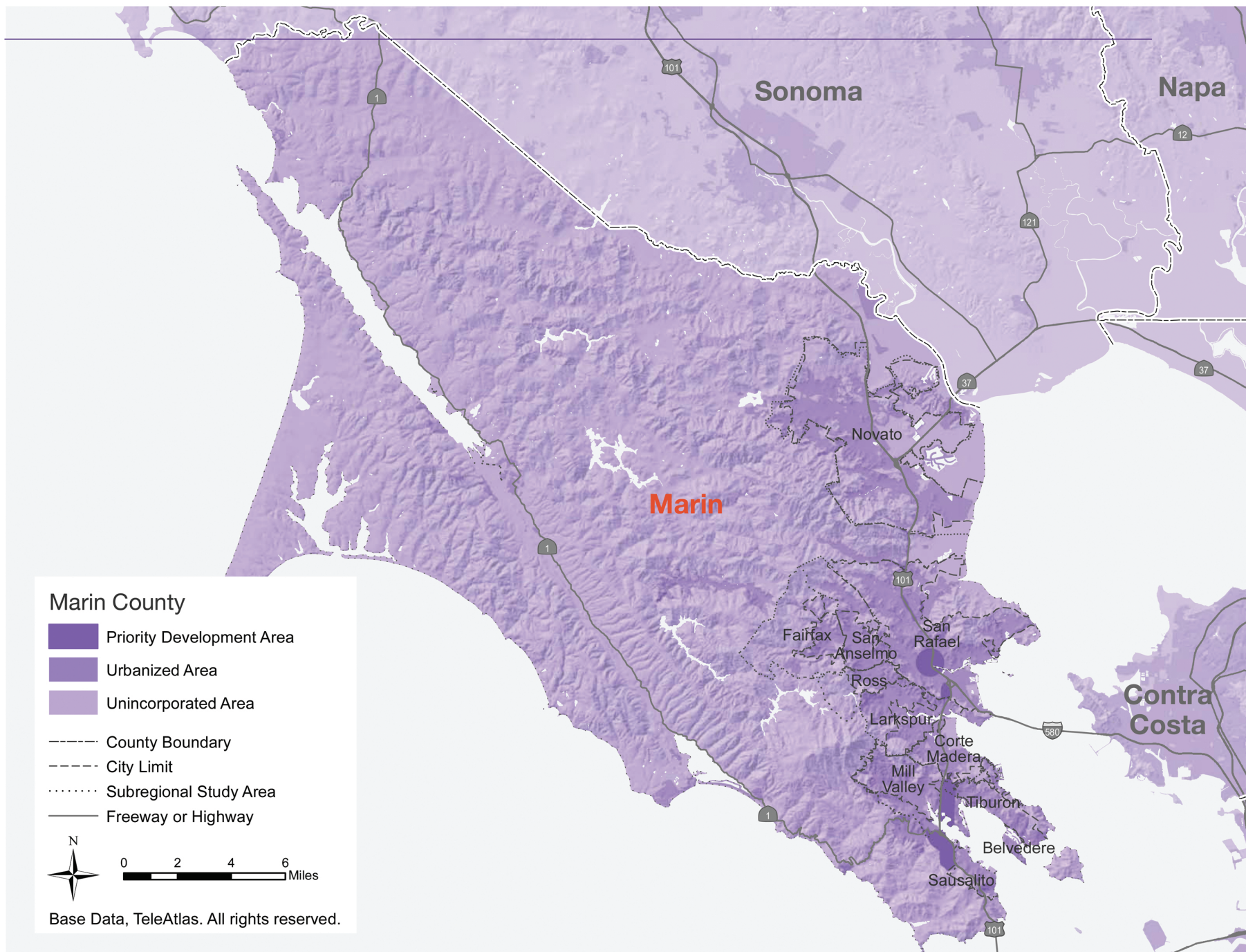
## Jurisdictional Boundary

	2010	2015	2020	2025	2030	2035	2040
ANTIOCH	19,090	20,630	22,320	22,980	23,660	24,580	25,530
BRENTWOOD	8,670	9,410	10,230	10,540	10,830	11,240	11,660
CLAYTON	1,540	1,630	1,750	1,800	1,840	1,890	1,950
CONCORD	47,640	52,900	58,880	61,050	63,320	66,290	69,450
DANVILLE	13,460	14,520	15,680	16,090	16,490	17,060	17,620
EL CERRITO	5,880	6,230	6,590	6,740	6,900	7,100	7,310
HERCULES	3,910	4,460	5,130	5,380	5,670	6,030	6,440
LAFAYETTE	9,940	10,580	11,280	11,530	11,770	12,100	12,430
MARTINEZ	18,320	19,260	20,260	20,720	21,180	21,820	22,490
MORAGA	4,740	5,020	5,320	5,440	5,570	5,750	5,940
OAKLEY	3,750	4,410	5,220	5,520	5,850	6,240	6,680
ORINDA	5,530	5,910	6,310	6,430	6,570	6,750	6,940
PINOLE	6,740	7,150	7,600	7,790	7,970	8,220	8,490
PITTSBURG	14,180	15,490	16,950	17,530	18,140	18,950	19,800
PLEASANT HILL	17,370	18,680	20,120	20,710	21,300	22,110	22,940
RICHMOND	30,790	33,490	36,540	37,720	38,960	40,600	42,320
SAN PABLO	7,470	7,970	8,510	8,740	8,990	9,310	9,660
SAN RAMON	43,960	47,560	51,590	52,970	54,400	56,320	58,320
WALNUT CREEK	41,720	45,550	49,860	51,400	52,990	55,130	57,380
UNINCORPORATED	40,220	43,760	47,670	48,980	50,330	52,150	54,040
<b>CONTRA COSTA COUNTY</b>	<b>344,920</b>	<b>374,610</b>	<b>407,810</b>	<b>420,060</b>	<b>432,730</b>	<b>449,640</b>	<b>467,390</b>

Contra Costa County Priority Development Areas	Place Type	Population		Households		Jobs	
		2010	2040	2010	2040	2010	2040
Antioch Hillcrest eBART Station	Suburban Center	380	6,100	150	2,400	20	3,260
Antioch Rivertown Waterfront	Transit Town Center	4,030	9,580	1,430	3,330	4,030	4,530
Concord Community Reuse Area	Regional Center	260	12,260	70	3,320	170	14,200
Concord Community Reuse Area	Transit Neighborhood	0	25,460	0	8,960	0	3,240
Concord Downtown	City Center	11,050	19,700	4,200	7,530	7,850	10,200
Danville Downtown Danville	Transit Town Center	2,740	4,410	1,370	2,130	5,320	7,290
El Cerrito San Pablo Avenue Corridor: Del Norte	Mixed-Use Corridor	1,330	2,490	630	1,150	1,850	2,240
El Cerrito San Pablo Avenue Corridor: South	Mixed-Use Corridor	1,370	2,700	590	1,140	1,670	2,110
Hercules Central Hercules	Transit Neighborhood	1,230	8,820	400	2,800	800	1,830
Hercules Waterfront District	Transit Town Center	2,040	5,450	640	1,660	1,230	1,890
Hercules WCCTAC San Pablo Ave Corridor	Mixed-Use Corridor	2,030	4,600	600	1,310	730	1,180
Lafayette Downtown	Transit Neighborhood	3,860	6,000	1,890	2,840	5,250	6,730
Martinez Downtown	Transit Neighborhood	2,020	3,890	750	1,460	4,040	5,110
Moraga Moraga Center	Transit Town Center	1,300	2,360	430	760	1,140	1,510
Oakley Employment Area	Suburban Center	1,350	3,650	560	1,450	680	2,290
Oakley Downtown	Transit Town Center	1,750	5,930	520	1,690	800	1,390
Oakley Potential Planning Area	Transit Neighborhood	3,140	7,440	980	2,240	290	880
Orinda Downtown	Transit Town Center	650	1,100	330	530	3,220	3,980
Pinole Old Town	Transit Town Center	3,370	3,950	1,300	1,470	2,840	3,440
Pinole Appian Way Corridor	Suburban Center	1,280	2,830	520	1,110	2,430	3,190
Pittsburg Pittsburg/Bay Point BART Station	Transit Town Center	0	3,590	0	1,070	140	1,450
Pittsburg Railroad Avenue eBART Station	Transit Town Center	11,690	24,290	3,600	7,240	5,610	7,930
Pittsburg Downtown	Transit Neighborhood	4,890	11,120	1,600	3,540	1,390	2,500
Pleasant Hill Diablo Valley College	Transit Neighborhood	800	1,590	330	640	2,550	4,190
Pleasant Hill Buskirk Avenue Corridor	Mixed-Use Corridor	3,360	3,830	1,620	1,750	4,590	6,200
Richmond Central Richmond & 23rd Street Corridor	City Center	14,430	17,500	4,700	5,480	6,600	8,670
Richmond Central Richmond & 23rd Street Corridor	Mixed-Use Corridor	2,500	6,030	640	1,460	310	660
Richmond South Richmond	Transit Neighborhood	8,000	12,030	3,250	4,740	7,030	9,360
Richmond WCCTAC San Pablo Ave Corridor	Mixed-Use Corridor	4,020	8,150	1,710	3,350	1,790	3,010
San Pablo San Pablo Avenue & 23rd Street	Mixed-Use Corridor	7,120	12,010	2,530	4,110	5,530	7,510
San Ramon City Center	Suburban Center	1,200	3,690	480	1,390	10,430	17,800
San Ramon North Camino Ramon	Transit Town Center	60	3,980	40	1,820	11,430	14,460
Walnut Creek West Downtown	Suburban Center	2,220	7,180	1,270	3,970	7,450	12,070
Contra Costa County Unincorporated Contra Costa Centre	Mixed-Use Corridor	2,970	3,970	1,780	2,310	3,740	4,750
Contra Costa County Unincorporated North Richmond	Transit Neighborhood	3,720	5,500	1,030	1,410	1,490	1,980
Contra Costa County Unincorporated Pittsburg/Bay Point BART Station	Transit Neighborhood	3,160	5,750	1,020	1,800	400	1,150
Contra Costa County Unincorporated Downtown El Sobrante	Mixed-Use Corridor	4,430	5,990	1,670	2,190	940	1,430
Contra Costa County Unincorporated WCCTAC San Pablo Ave Corridor	Mixed-Use Corridor	5,030	5,960	1,590	1,830	680	990

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Marin County





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# Marin County

Marin County is known for its scenic beauty, with abundant open spaces that support farming, ranching, tourism, recreation, wildlife habitat, and water management. Reflecting the desire to protect and preserve the county's iconic landscapes, about half of its land area is protected as open space. Plan Bay Area will support continued protection of the many Priority Conservation Areas in Marin County.

Urbanized areas are predominantly located in the eastern portion of the county, along US Highway 101. Marin County has low residential densities and low intensities of employment and retail uses. In addition to highway linkages, ferry terminals and Golden Gate Transit currently connect the county to the region, and the approved Sonoma Marin Area Rail Transit (SMART) project will further enhance transit options.

Marin County, which currently has about three percent of the region's jobs and four percent of the region's population, is projected to assume about one percent of the Bay Area's total household growth and two percent of its employment growth between 2010 and 2040. The county has two PDAs.



Marin County-Santa Venetia Marsh (Credit: Craig Solin)



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## ECONOMY

Marin County's economy is based on tourism, financial services, technology, and retail. The County of Marin is one of the largest employers, along with several corporate headquarters. The largest sector in is Professional and Managerial Services, which comprised 18 percent of Marin's jobs in 2010. Reflecting its economic strengths, Marin County has higher shares of employment in Retail, Financial and Managerial Services, and Arts, Recreation and Other Services relative to the region.

Overall, the county is projected to have a net increase of 18,000 jobs between 2010 and 2040, a growth rate of 17 percent. Construction employment is expected to grow the fastest between 2010 and 2040 (73 percent), higher than the region wide rate for this sector. The Professional and Managerial Services sector, however, is expected to account for 70 percent of projected employment growth. Job levels are expected to decline in several sectors such as Manufacturing and Wholesale.

It is anticipated that Sausalito will experience the largest percentage growth in jobs (23 percent), while San Rafael and Novato will accommodate the greatest absolute number of new jobs. Combined, these three cities account for two-thirds of projected job growth. In addition, nearly 3,000 new jobs are projected for unincorporated areas, an 18 percent increase over 2010 levels. All other cities in Marin County are each expected to add fewer than 1,000 new jobs.

## POPULATION

As of 2010, 27 percent of Marin County's population lives in unincorporated areas, while 43 percent live in San Rafael and Novato. The population of Marin County is estimated to grow by 33,000 residents (13 percent), reaching a total population of 285,000 residents by 2040. This is the lowest projected growth rate of all Bay Area coun-

ties.

The number of households in the county is projected to increase by 9 percent, adding 8,800 households and exceeding 112,000 by 2040. The city of San Rafael is projected to have the highest percentage population increase of Marin jurisdictions (19 percent), as well as the largest percentage and absolute increases in households. By 2040, Novato is projected to add over 1,100 households (a six percent increase), remaining the county's second largest city in terms of population and economic activity. The remaining nine cities and towns are projected to account for 29 percent of the county's household growth and 25 percent of its job growth between 2010 and 2040. Belvedere will likely remain the smallest city in terms of population with 2,200 residents in 2040, growing by only eight percent over 2010.



Marin County (Credit: Andy Peri)

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## PRIORITY DEVELOPMENT AREAS

The limited amount of growth projected for Marin County will be mainly targeted to urbanized areas, where transit is most accessible. There are only two Priority Development Areas (PDAs) in Marin County, including one in San Rafael and one that covers several unincorporated neighborhoods along Highway 101. Combined, the PDAs are projected to accommodate 34 percent of the county's household growth and 22 percent of job growth by 2040.

### San Rafael

The population of San Rafael is projected to approach 69,000 by 2040. The city will add about 3,700 households and over 7,000 new jobs, which will represent about 40 percent of the county's household and job growth. The PDA in downtown is intended to enhance the area as an economic and cultural center for the Marin community. New development in this PDA will support existing amenities, businesses, and services. San Rafael is planning to accommodate about 66 percent of its household growth and 47



Marin County (Credit: Andy Peri)

percent of its job growth within the PDA.

### Unincorporated Marin County

Although unincorporated Marin County is mostly rural, there are several areas within a half mile of Highway 101 with the potential to accommodate growth. To coordinate future development in these areas, the County created the Urbanized Highway 101 Corridor PDA, which is served by a variety of transit services including express bus service to job centers in San Francisco, Petaluma, and Santa Rosa. The addition of 515 households and 700 jobs in the PDA will increase housing options and improve access to amenities, services, and employment.



San Rafael



San Rafael



## Marin County Projections

	2010	2015	2020	2025	2030	2035	2040
Population	252,409	256,700	261,100	266,600	272,100	278,600	285,400
Household Population	243,365	247,200	250,800	255,500	260,000	265,300	271,200
Households	103,210	104,650	106,170	107,610	109,100	110,540	112,050
Persons Per Household	2.36	2.36	2.36	2.37	2.38	2.40	2.42
Employed Residents	117,260	123,720	130,610	130,540	130,510	132,040	133,690
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	750	770	780	760	720	690	670
Construction	5,910	7,300	8,780	9,080	9,380	9,800	10,220
Manufacturing & Wholesale	4,640	4,760	4,910	4,270	3,710	3,130	2,650
Retail	14,240	14,330	14,460	14,470	14,480	14,500	14,530
Transportation & Utilities	1,210	1,130	1,050	1,040	1,020	1,010	980
Information	2,320	1,710	1,060	1,000	950	830	720
Financial & Leasing	7,840	6,840	5,680	5,630	5,560	5,410	5,230
Professional & Managerial Services	20,230	23,120	26,270	27,780	29,330	31,260	33,290
Health & Educational Services	18,510	19,470	20,470	21,040	21,640	22,380	23,160
Arts, Recreation & Other Services	19,080	19,850	20,650	20,960	21,270	21,680	22,110
Government	16,000	15,940	15,880	15,840	15,760	15,660	15,590
<b>Total Jobs</b>	<b>110,730</b>	<b>115,220</b>	<b>119,990</b>	<b>121,870</b>	<b>123,820</b>	<b>126,350</b>	<b>129,150</b>

## Total Population

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
BELVEDERE	2,068	2,100	2,100	2,200	2,200	2,200	2,200
CORTE MADERA	9,253	9,400	9,500	9,700	9,800	10,000	10,200
FAIRFAX	7,441	7,500	7,600	7,800	7,900	8,100	8,200
LARKSPUR	11,926	12,100	12,400	12,600	12,900	13,200	13,500
MILL VALLEY	13,903	14,100	14,300	14,600	14,800	15,100	15,400
NOVATO	51,904	52,500	53,200	53,900	54,700	55,700	56,700
ROSS	2,415	2,500	2,500	2,500	2,600	2,600	2,700
SAN ANSELMO	12,336	12,500	12,600	12,800	13,000	13,200	13,400
SAN RAFAEL	57,713	59,200	60,800	62,600	64,400	66,500	68,700
SAUSALITO	7,061	7,200	7,300	7,400	7,600	7,700	7,900
TIBURON	8,962	9,100	9,200	9,400	9,500	9,700	9,900
UNINCORPORATED	67,427	68,500	69,600	71,100	72,700	74,600	76,600
<b>MARIN COUNTY</b>	<b>252,409</b>	<b>256,700</b>	<b>261,100</b>	<b>266,600</b>	<b>272,100</b>	<b>278,600</b>	<b>285,400</b>

## Households

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
BELVEDERE	928	930	950	960	960	960	970
CORTE MADERA	3,793	3,840	3,890	3,930	3,980	4,030	4,080
FAIRFAX	3,379	3,420	3,460	3,500	3,540	3,580	3,620
LARKSPUR	5,908	6,000	6,090	6,180	6,270	6,360	6,450
MILL VALLEY	6,084	6,160	6,240	6,310	6,390	6,460	6,540
NOVATO	20,279	20,470	20,680	20,880	21,070	21,250	21,450
ROSS	798	810	820	830	840	850	860
SAN ANSELMO	5,243	5,290	5,340	5,390	5,440	5,480	5,530
SAN RAFAEL	22,764	23,370	24,000	24,600	25,240	25,860	26,490
SAUSALITO	4,112	4,170	4,230	4,290	4,350	4,410	4,470
TIBURON	3,729	3,770	3,820	3,870	3,910	3,960	4,000
UNINCORPORATED	26,193	26,420	26,650	26,870	27,110	27,340	27,590
<b>MARIN COUNTY</b>	<b>103,210</b>	<b>104,650</b>	<b>106,170</b>	<b>107,610</b>	<b>109,100</b>	<b>110,540</b>	<b>112,050</b>

## Total Jobs

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
BELVEDERE	430	440	470	470	470	470	480
CORTE MADERA	7,940	8,040	8,130	8,150	8,190	8,210	8,260
FAIRFAX	1,490	1,580	1,670	1,710	1,740	1,790	1,820
LARKSPUR	7,190	7,330	7,510	7,570	7,640	7,710	7,810
MILL VALLEY	5,980	6,190	6,400	6,480	6,550	6,670	6,790
NOVATO	20,890	21,770	22,710	23,040	23,410	23,870	24,390
ROSS	510	530	550	550	560	580	590
SAN ANSELMO	3,740	3,900	4,080	4,140	4,190	4,270	4,360
SAN RAFAEL	37,620	39,370	41,200	41,990	42,790	43,830	44,960
SAUSALITO	6,220	6,540	6,880	7,030	7,200	7,400	7,640
TIBURON	2,340	2,420	2,510	2,550	2,580	2,630	2,690
UNINCORPORATED	16,380	17,110	17,880	18,190	18,500	18,920	19,360
<b>MARIN COUNTY</b>	<b>110,730</b>	<b>115,220</b>	<b>119,990</b>	<b>121,870</b>	<b>123,820</b>	<b>126,350</b>	<b>129,150</b>

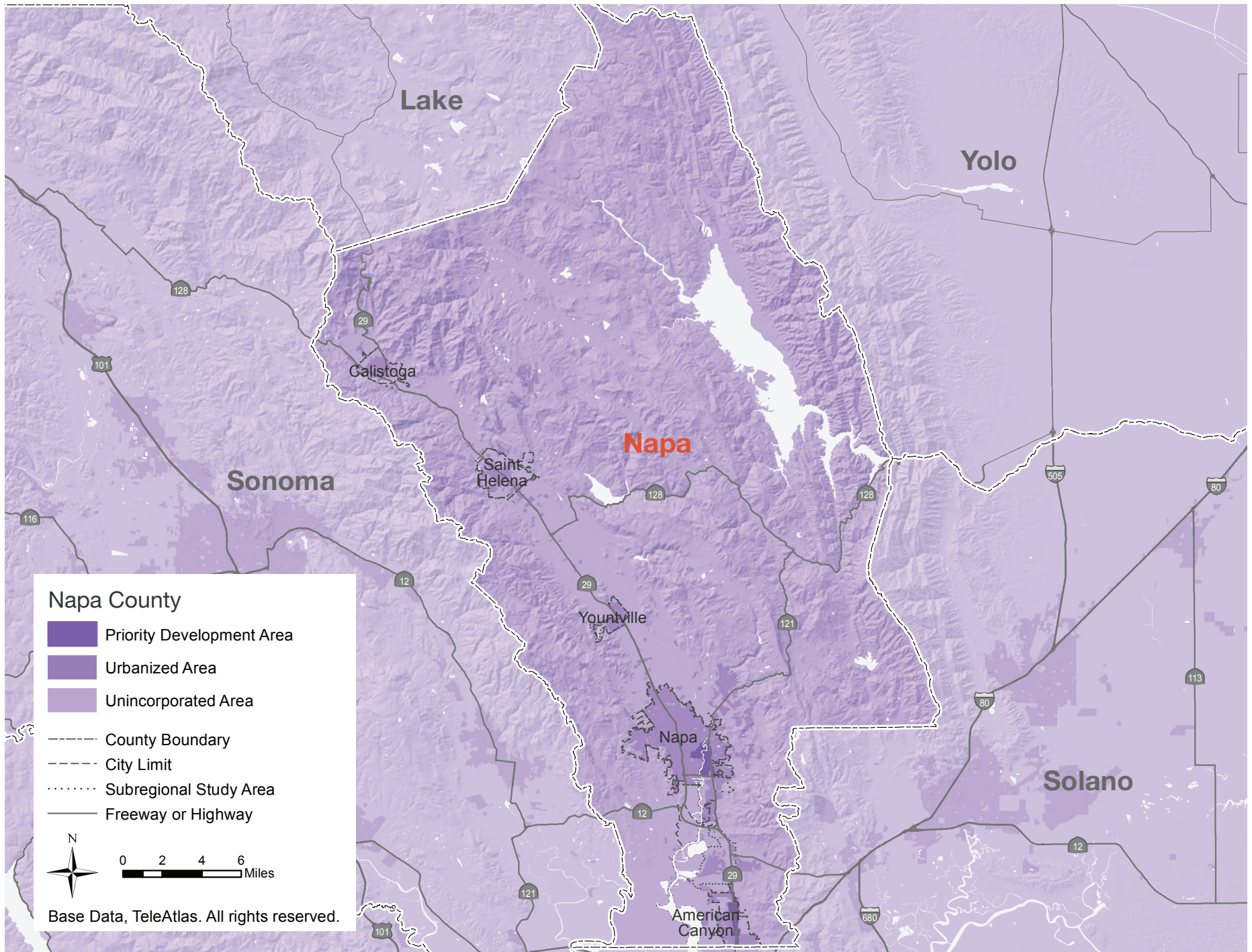
Marin County Priority Development Areas	Place Type	Population		Households		Jobs	
		2010	2040	2010	2040	2010	2040
San Rafael Downtown	City Center	5,130	8,320	2,420	3,830	8,250	10,480
San Rafael Civic Center/North Rafael Town Center	Transit Town Center	4,390	7,120	1,900	2,950	5,660	6,860
Marin County Unincorporated Urbanized 101 Corridor	Transit Neighborhood	10,000	11,570	4,290	4,810	2,260	2,960





V.

Napa County





# Napa County

Napa County has been a leader in agricultural and open space preservation since the 1960s. In 1980, county voters passed the Slow Growth Initiative (Measure A), which restricts annual growth in unincorporated areas to one percent per year. While Measure P, originally passed in 1990 and reapproved in 2008, requires voter approval before agricultural property can be converted to other uses and stipulates that new growth be accommodated within established urban limit lines.

Consistent with these policies, Napa County is projected to take on one percent of the region's household growth and two percent of its job growth. The vast majority of future development is expected to occur in the cities of Napa and American Canyon. Napa is likely to remain the least populous county in the Bay Area through 2040.

Although the county currently lacks a regional commuter rail service, VINE provides local bus service and express service to transit centers in Solano and Sonoma counties, as well as the El Cerrito Del Norte BART station. Residents, employees, and visitors rely primarily on Highway 12 and local roads for access and local travel. Given the limited amount of planned growth and transit access, only two PDAs have been designated in the county.



Napa (Credit: J Jones)

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## ECONOMY

Napa County has become a world-famous wine region, with vineyards dominating the agricultural landscape. In 2010, Agriculture and Natural Resources accounted for eight percent of its total jobs, the highest share in the Bay Area. Also reflecting the strength of the wine industry, the Manufacturing and Wholesale (wine production) sector employs the most people in the county with 19 percent of all jobs. The industry has helped make tourism an important part of the county's economy, which attracts over four million visitors each year. Accordingly, the Arts, Recreation, and Other Services sector accounts for 17 percent of the county's employment.

Due to its unique context and rural orientation, Napa County is estimated to experience different shifts in employment compared to re-



St. Helena, Stonebridge

gional trends. Sectors with higher rates of projected job growth over the next thirty years compared to the region include: Construction (121 percent), Professional and Managerial Services (85 percent), and Transportation and Utilities (81 percent). Notably, Napa is the only county in the Bay Area projected to experience a net increase in Agriculture and Natural Resources jobs, with jobs in that category growing by 15 percent (compared to a region-wide decrease of eight percent). Conversely, the county may see relatively slower growth in other sectors such as Government and Health and Educational Services.

Overall, the number of jobs in Napa County is projected to grow by 27 percent by 2040. Most of this employment will be channeled to the city of Napa and unincorporated areas, which assume a combined 84 percent of the county's projected growth. It is anticipated that American Canyon will see the largest percentage increase in jobs over the next 30 years (43 percent). In contrast, little job growth is projected for the communities of St. Helena, Calistoga, and Yountville in the northern portion of the county. The existing share of the county's jobs in unincorporated areas would remain at roughly one-third.

## POPULATION

Reflecting the county's rural character, only two cities have a population over 10,000, while almost 20 percent of residents live in unincorporated county areas. The largest of the five incorporated places is the city of Napa, with 56 percent of the county's 2010 population.

The population of Napa County is projected to grow by 20 percent, adding over 27,000 new residents by 2040. Consistent with the county's desire to direct growth to the larger cities, the cities of Napa and American Canyon will accommodate most of the County's household growth (a combined 78 percent). American Canyon was one of the fastest growing cities in the region during the 2000s and is ex-

pected to continue this trend, growing an additional 35 percent and exceeding 26,000 residents by 2040.

Over the next 30 years, Yountville is also projected to experience high population growth (29 percent), while the populations of Calistoga and St. Helena are each expected to grow by nine percent. These cities will continue to have populations of less than 7,000 people each. About 18 percent of household growth is projected for unincorporated county lands.



## PRIORITY DEVELOPMENT AREAS

There are two PDAs in the county, including one in American Canyon and one in the city of Napa. Combined, the PDAs are projected to accommodate 33 percent of household growth and 18 percent of job growth by 2040. Accommodating future housing and employment growth in the PDAs may encourage transit use, walking, and biking.

### Napa

By 2040, the city of Napa's population is projected to grow by 17 percent, reaching over 90,000 residents. The city is expected to accommodate roughly 3,900 new households and 10,600 new jobs. About a quarter of the city's household and job growth is planned to occur in its PDA covering the Downtown/Soscol Corridor. This PDA will build upon its existing assets as a thriving business community, helping to create a distinct sense of place for downtown Napa and the Soscol gateway.



Napa Waterfront Development



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## American Canyon

American Canyon will add nearly 2,000 households and 1,200 jobs over the next 30 years. The city's PDA runs along Highway 29 and is projected to accommodate 78 percent of American Canyon's new households and 65 percent of new jobs. The vision for the PDA is to create a thriving retail service and residential hub for the community, with new open spaces, gathering places, and a well-integrated circulation network for pedestrians, bicyclists, and vehicles.



Napa Waterfront (Credit: J Jones)

## Napa County Projections

	2010	2015	2020	2025	2030	2035	2040
Population	136,484	140,300	144,200	148,600	153,100	158,400	163,700
Household Population	131,566	135,100	138,700	142,700	146,800	151,400	156,200
Households	48,876	50,100	51,370	52,560	53,840	55,050	56,310
Persons Per Household	2.69	2.70	2.70	2.71	2.73	2.75	2.77
Employed Residents	61,450	65,590	70,030	70,730	71,470	73,050	74,690
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	5,790	5,920	6,050	6,070	6,090	6,380	6,670
Construction	2,730	3,750	4,930	5,160	5,400	5,710	6,040
Manufacturing & Wholesale	13,210	13,600	13,960	13,680	13,400	13,240	13,090
Retail	6,410	6,710	7,020	7,060	7,090	7,180	7,270
Transportation & Utilities	1,650	2,090	2,600	2,670	2,740	2,860	2,980
Information	660	660	660	660	660	660	660
Financial & Leasing	2,410	2,510	2,580	2,590	2,590	2,600	2,610
Professional & Managerial Services	5,650	6,660	7,870	8,410	8,980	9,690	10,440
Health & Educational Services	9,110	9,890	10,770	11,250	11,750	12,370	13,020
Arts, Recreation & Other Services	11,680	12,420	13,220	13,520	13,830	14,240	14,660
Government	11,360	11,490	11,580	11,670	11,770	11,950	12,100
<b>Total Jobs</b>	<b>70,660</b>	<b>75,700</b>	<b>81,240</b>	<b>82,740</b>	<b>84,300</b>	<b>86,880</b>	<b>89,540</b>

## Total Population

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
AMERICAN CANYON	19,454	20,500	21,500	22,600	23,700	25,000	26,200
CALISTOGA	5,155	5,200	5,300	5,400	5,500	5,500	5,600
NAPA	76,915	78,800	80,700	82,800	85,100	87,700	90,300
ST. HELENA	5,814	5,900	6,000	6,100	6,100	6,200	6,300
YOUNTVILLE	2,933	3,000	3,100	3,300	3,400	3,600	3,800
UNINCORPORATED	26,213	26,900	27,600	28,400	29,300	30,400	31,500
<b>NAPA COUNTY</b>	<b>136,484</b>	<b>140,300</b>	<b>144,200</b>	<b>148,600</b>	<b>153,100</b>	<b>158,400</b>	<b>163,700</b>

## Households

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
AMERICAN CANYON	5,657	5,980	6,310	6,620	6,970	7,300	7,630
CALISTOGA	2,019	2,040	2,070	2,090	2,100	2,110	2,130
NAPA	28,166	28,800	29,440	30,060	30,730	31,370	32,020
ST. HELENA	2,401	2,420	2,450	2,480	2,490	2,500	2,520
YOUNTVILLE	1,050	1,060	1,080	1,090	1,100	1,100	1,110
UNINCORPORATED	9,583	9,800	10,020	10,220	10,450	10,670	10,900
<b>NAPA COUNTY</b>	<b>48,876</b>	<b>50,100</b>	<b>51,370</b>	<b>52,560</b>	<b>53,840</b>	<b>55,050</b>	<b>56,310</b>

Total Jobs	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
AMERICAN CANYON	2,920	3,250	3,650	3,750	3,850	3,990	4,160
CALISTOGA	2,220	2,340	2,450	2,480	2,520	2,590	2,640
NAPA	33,950	36,660	39,650	40,610	41,610	43,030	44,520
ST. HELENA	5,340	5,590	5,860	5,910	5,970	6,110	6,230
YOUNTVILLE	1,600	1,700	1,810	1,840	1,870	1,930	1,980
UNINCORPORATED	24,630	26,160	27,820	28,150	28,480	29,230	30,010
<b>NAPA COUNTY</b>	<b>70,660</b>	<b>75,700</b>	<b>81,240</b>	<b>82,740</b>	<b>84,300</b>	<b>86,880</b>	<b>89,540</b>

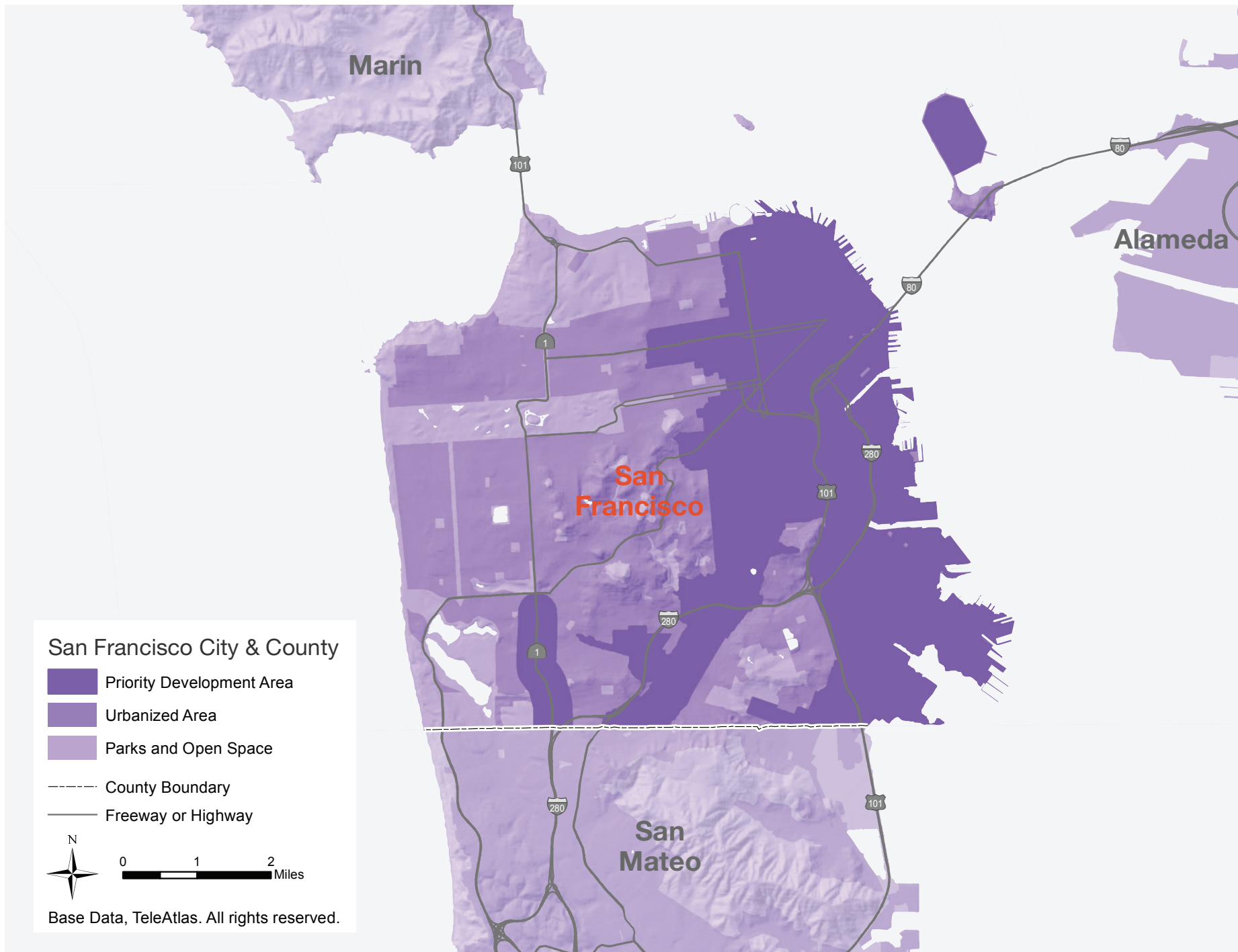
Napa County Priority Development Areas	Place Type	Population		Households		Jobs	
		2010	2040	2010	2040	2010	2040
American Canyon Highway 29 Corridor	Mixed-Use Corridor	1,150	5,800	400	1,930	1,280	2,100
Napa Downtown Napa & Soscol Gateway Corridor	Transit Neighborhood	2,430	5,160	730	1,670	10,950	13,580





vi.

San Francisco  
City and County



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# San Francisco City and County

The City and County of San Francisco is one of California's largest cities and home to many of the region's landmarks. Like many port cities, the convergence of cultures in one location has resulted in a diverse population. Surrounded by water, San Francisco's employment and population growth over the decades has been accommodated through intense development throughout the city's varied neighborhoods. As a result, the city has the highest residential and commercial densities in the region. Demand to live in the city continues to be strong.

As one of the region's largest employment hubs, San Francisco brings in nearly one half million commuters each day. Accommodating commuters, residents, and visitors, San Francisco has an extensive public transit system that integrates MUNI, BART, Caltrain, bus service from surrounding counties, and ferry service among others. Both the new Transbay Terminal and the new Bayshore Intermodal Station at the southern border of the city will improve transit commutes for current and future residents.

The existing concentration of jobs and transit makes the city a key location to focus growth yet presents infrastructural challenges. From 2010 to 2040, San Francisco is estimated to absorb 15 percent of the region's total household growth and 17 percent of total job growth. This growth will cluster in PDAs with adopted plans on the eastern side of the city, as well as in downtown and along future Bus Rapid Transit (BRT) lines on Van Ness Avenue and Geary Boulevard.



Crissy Field

## ECONOMY

San Francisco is a major financial and cultural center, as well as a premier tourist destination in North America. In recent years San Francisco has also emerged as a center for innovative companies and enterprises. The county share of jobs in Financial and Leasing (10 percent) is double the share of employment in this sector at the regional level. Similarly, the Arts, Recreation, and Other Services (capturing much of the tourism-oriented industries) accounts for 19 percent of San Francisco's jobs, five percentage points higher than the regional share. The largest share of the county's employment is in Professional and Managerial Services (23 percent).

Over the next thirty years, San Francisco's employment base is expected to increase by 34 percent, or 191,000 jobs. About 40 percent of projected jobs are in Professional and Managerial Services, which will remain the dominant sector with 27 percent of the city's employment in 2040. The Construction and Health and Educational Services sectors will also experience substantial growth in employment between 2010 and 2040 (72 and 55 percent, respectively).

## POPULATION

By 2040, the population of San Francisco is projected to grow by 35 percent (280,000 residents), reaching close to 1.1 million people. To accommodate such growth, the city is expected to add 102,000 households, representing a 29 percent increase over 2010 levels.



San Francisco Mission



## PRIORITY DEVELOPMENT AREAS

San Francisco has 12 PDAs, generally located in the eastern part of the city and comprising about 25 percent of San Francisco's land area. The PDAs were chosen after a process with extensive local engagement and are projected to accommodate 88 percent of the city's population growth, 92 percent of its new households, and 85 percent of its new jobs through 2040. We discuss below some of the largest PDAs in the city in terms of population, households, and jobs.

### Downtown-Van Ness-Geary

Downtown remains the largest job center within San Francisco. Housing and mixed-use development is expected along new BRT corridors on Geary Boulevard and Van Ness Avenue. This PDA will grow the most in terms of jobs, households, and population. In comparison to 2010, by 2040 this part of the city is projected to house 66,000 more residents, accommodate an additional 32,000 households, and provide 53,000 more jobs.

### Transbay Terminal

The Transbay Terminal PDA will be home to the Transbay Transit Center—a modern regional hub that will link 11 different transit systems including California High Speed Rail (CHSR). The area around the Transit Center will include office, high density housing, and hotel uses and is envisioned to be the heart of the new downtown. The area is expected to grow from around 400 households in 2010 to 5,000 households in 2040. The number of jobs in the Transbay Terminal PDA is also expected to nearly quintuple from 8,000 in 2010 to 38,000 in 2040.

### Eastern Neighborhoods

This PDA encompasses the Mission, a portion of South of Market (SOMA), Showplace Square, Potrero Hill, and Central Waterfront neighborhoods of San Francisco. These communities are diverse in both population and business types. While home to substantial residential areas and vibrant commercial streets with neighborhood-serving retail, the area also contains much of the city's industrial land. Ac-



San Francisco Octavia Boulevard



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cording to San Francisco's planning department half of the neighborhood's existing industrial areas will be converted to mixed use zones that encourage much-needed new housing. The remaining half will be reserved for Production, Distribution and Repair (PDR) districts which house a variety of functions — including art performance spaces, furniture wholesalers, etc. — and incubate small businesses. There is a high level of transit service in the area, with BART stations, MUNI, and Caltrain stops. These neighborhoods will be making a number of infrastructure improvements to support the development of multimodal streets. By 2040 the Eastern Neighborhoods are collectively expected to add over 12,000 households, over 31,000 people, and nearly 10,000 jobs.

### **Bayview/Hunters Point Shipyard/Candlestick Point**

This PDA encompasses a large area with housing, commercial, and industrial uses served by several transit agencies (MUNI, Caltrain, and SamTrans) that provide connections throughout the city and the re-

gion.

The planned future development of Candlestick Point and the Hunters Point Shipyard will convert outdated industrial land into a neighborhood with a mix of homes, jobs, and over 300 acres of new waterfront parks. Plans for the Bayview neighborhood include revitalization of existing housing as well as additional commercial and other infill development along the Third Street corridor. Industrial uses will continue around Highway 280 and within the South Basin area. After the Downtown-Van Ness-Geary PDA, the Bayview/Hunters Point Shipyard/Candlestick Point PDA will have the largest population growth with an expected increase of 41,000, from 2010 to 2040, in 11,300 new households. While not a major job hub, the neighborhood is still expected to add about 9,700 new jobs.

### **Treasure Island**

Plans for Treasure Island, once a Naval and Coast Guard base, envision new, dense housing and commercial development centered on a ferry connection

to downtown San Francisco. The area is expected to include jobs, housing, food production, transit access, water treatment, energy conservation and production, schools and open space. The neighborhood is projected to grow in population from 2,700 residents in 2010 to 29,000 in 2040. While Treasure Island is planned to be a predominantly residential neighborhood, it is still projected to add nearly 2,800 jobs by 2040.



San Francisco

## San Francisco County Projections

	2010	2015	2020	2025	2030	2035	2040
Population	805,235	847,000	890,400	934,800	981,800	1,032,500	1,085,700
Household Population	780,971	821,800	863,800	906,800	952,500	1,000,800	1,051,100
Households	345,811	362,440	379,600	396,000	413,370	430,070	447,350
Persons Per Household	2.26	2.27	2.28	2.29	2.30	2.33	2.35
Employed Residents	422,510	460,450	501,470	515,490	530,200	550,560	571,580
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	420	430	440	420	400	370	350
Construction	14,860	18,280	22,030	22,770	23,530	24,560	25,620
Manufacturing & Wholesale	21,960	22,610	23,230	22,080	20,980	20,080	19,210
Retail	44,970	46,950	49,030	49,250	49,470	50,080	50,700
Transportation & Utilities	12,030	10,990	9,980	9,830	9,680	9,410	9,150
Information	20,800	23,550	26,520	26,770	27,020	27,540	28,060
Financial & Leasing	54,660	61,990	70,310	70,770	71,160	72,400	73,590
Professional & Managerial Services	129,800	146,630	165,640	174,420	183,630	195,010	207,060
Health & Educational Services	64,660	71,740	79,590	83,920	88,460	94,070	100,020
Arts, Recreation & Other Services	106,390	115,170	124,660	128,210	131,850	136,670	141,650
Government	98,170	99,080	99,800	100,640	101,490	102,780	104,090
<b>Total Jobs</b>	<b>568,720</b>	<b>617,420</b>	<b>671,230</b>	<b>689,080</b>	<b>707,670</b>	<b>732,970</b>	<b>759,500</b>

## Total Population

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
SAN FRANCISCO	805,235	847,000	890,400	934,800	981,800	1,032,500	1,085,700
<b>SAN FRANCISCO COUNTY</b>	<b>805,235</b>	<b>847,000</b>	<b>890,400</b>	<b>934,800</b>	<b>981,800</b>	<b>1,032,500</b>	<b>1,085,700</b>

## Households

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
SAN FRANCISCO	345,811	362,440	379,600	396,000	413,370	430,070	447,350
<b>SAN FRANCISCO COUNTY</b>	<b>345,811</b>	<b>362,440</b>	<b>379,600</b>	<b>396,000</b>	<b>413,370</b>	<b>430,070</b>	<b>447,350</b>

## Total Jobs

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
SAN FRANCISCO	568,720	617,420	671,230	689,080	707,670	732,970	759,500
<b>SAN FRANCISCO COUNTY</b>	<b>568,720</b>	<b>617,420</b>	<b>671,230</b>	<b>689,080</b>	<b>707,670</b>	<b>732,970</b>	<b>759,500</b>

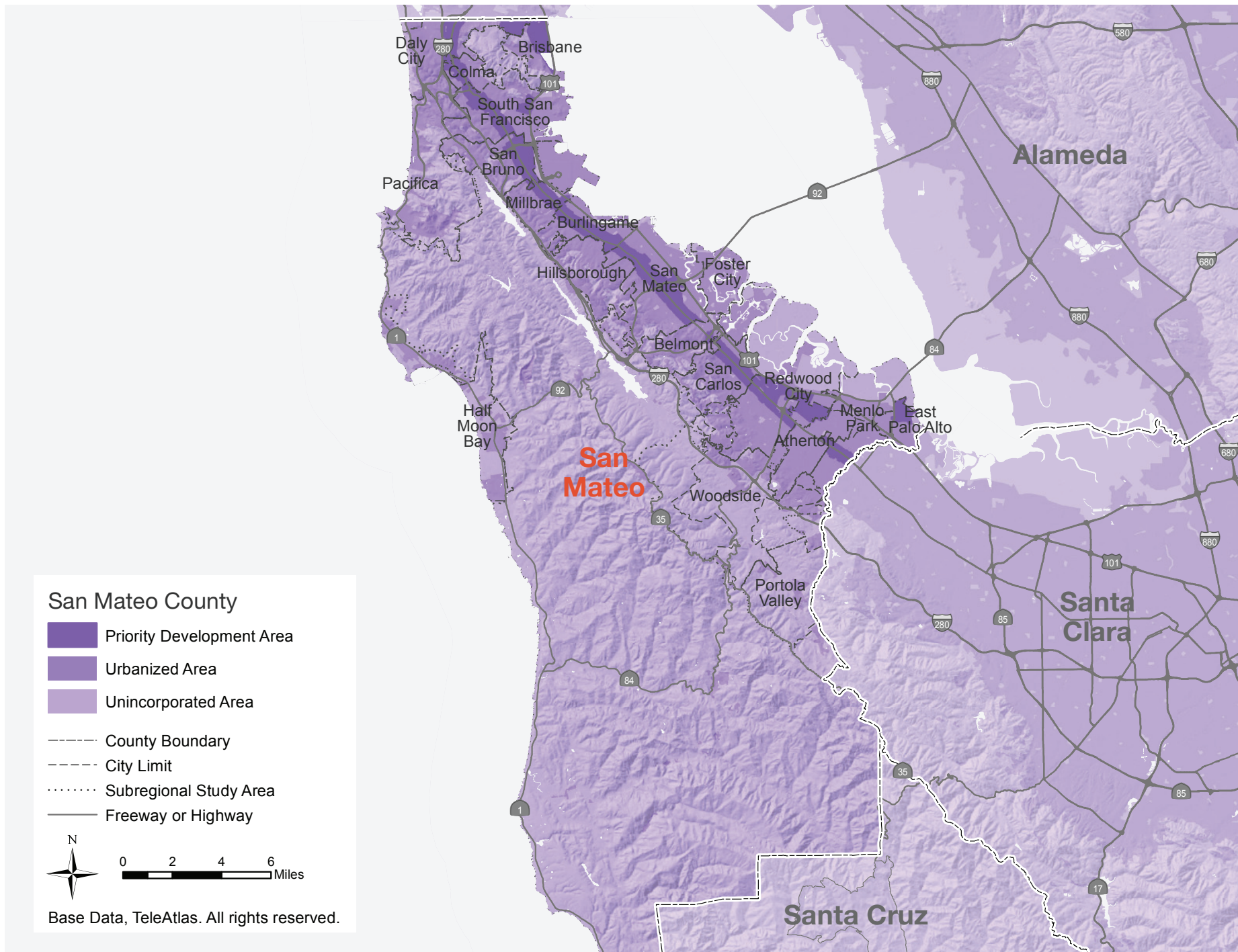
San Francisco County Priority Development Areas	Place Type	Population		Households		Jobs	
		2010	2040	2010	2040	2010	2040
Bayview/Hunters Point Shipyard/Candlestick Point	Urban Neighborhood	36,720	77,570	10,470	21,770	19,590	29,260
Balboa Park	Transit Neighborhood	3,820	9,860	1,190	3,020	2,690	3,460
Downtown-Van Ness-Geary	Regional Center	163,390	229,100	89,850	121,620	315,570	368,150
Eastern Neighborhoods	Urban Neighborhood	73,820	104,880	31,650	43,820	61,070	70,890
Mission Bay	Urban Neighborhood	6,540	13,730	3,200	6,610	2,770	27,200
Port of San Francisco	Mixed-Use Corridor	210	3,820	110	1,910	5,430	24,400
Transbay Terminal	Regional Center	410	8,790	190	4,990	7,950	37,660
Treasure Island	Transit Town Center	2,710	28,550	590	7,750	260	3,010
San Francisco/San Mateo Bi-County Area (with Brisbane)	Transit Neighborhood	5,860	26,850	1,510	6,720	1,720	2,590
19th Avenue	Transit Town Center	14,570	31,670	4,790	10,870	9,980	13,570
Market & Octavia	Urban Neighborhood	19,760	32,100	11,130	17,540	31,850	34,790
Mission-San Jose Corridor	Mixed-Use Corridor	79,070	86,260	29,360	30,880	12,680	18,760





vii.

San Mateo  
County



# San Mateo County

San Mateo County is the second smallest county in the Bay Area in terms of land area, with one-third protected as open space lands. Mountains divide the county into two distinct subareas: the coast and bayside. The coastal subarea includes the cities of Half Moon Bay and Pacifica. The other 18 cities in the county are bayside, where 90 percent of development is located.

Most of the bayside cities have downtowns clustered around El Camino Real and Caltrain stations. SamTrans provides bus service, and the northern portion of the county is also served by BART. Transit-oriented areas will continue to be the primary focus for future development in San Mateo County.

San Mateo County is projected to take on about nine percent of the region's total job growth and eight percent of its household growth. The vast majority of future development will occur within the county's 17 PDAs. Many of the PDAs are located along El Camino Real, and local governments and other stakeholders within San Mateo County are working together to transform this major transportation artery into a walkable Grand Boulevard that includes a mix of homes, stores, parks, and services.



Redwood City

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## ECONOMY

Although the cities of San Mateo County emerged as a series of “rail-road” bedroom communities for San Francisco, the county has developed its own vibrant economy with a job base as large as Contra Costa County’s. The local economy has benefitted from the spillover of firms from San Francisco’s financial sector and the northward spread of Silicon Valley’s technology sector, led by software company Oracle. The medical device and biotech industries are also important, with Genentech the second largest employer behind United Airlines (housed at the San Francisco International Airport). In 2010, Facebook moved their headquarters to Menlo Park, further reinforcing San Mateo County as part of Silicon Valley.

Jobs in Professional and Managerial Services currently make up 19 percent of all county employment. Although San Mateo County provides only 10 percent of the region’s total employment, it hosts 27 percent of jobs in Transportation and Utilities and 16 percent of Information jobs. Of all sectors, Information is projected to experience the highest growth rate between 2010 and 2040 (70 percent). Together, Health and Educational Services and Professional and Managerial Services are expected to account for 60 percent of the county’s job growth, consistent with regional trends. Employment in the Manufacturing and Wholesale sector could decline due to regional and national industry shifts, decreasing the share of county jobs from 12 to 7 percent.

Overall, San Mateo County is projected to add nearly 100,000 jobs by 2040, a 29 percent increase over 2010 levels. The cities of San Mateo, East Palo Alto, and Millbrae are expected to experience the largest percentage increase in jobs. San Mateo, Redwood City, and South San Francisco will accommodate the most absolute number of jobs, representing half of the county’s projected job growth during the three decades. The coastal cities of Half Moon Bay and Pacifica are projected

to experience a 20 percent increase in jobs over this time period, most of which will likely be in the health and education fields to serve the local population.

## POPULATION

The population of San Mateo County is projected to grow by 26 percent, reaching a total population of 900,000 people by 2040. The number of households is projected to increase by 22 percent to just over 315,000. The cities of Daly City, San Mateo, and Redwood City will continue to have the largest populations. Together, the cities will add over 73,000 residents, representing about 39 percent of the county’s growth between 2010 and 2040. Colma and Millbrae are expected to have the largest percentage increases in population (65 and 41 percent, respectively). Combined, the coastal cities and unincorporated county lands are projected to contribute 13 percent of the county’s population growth between 2010 and 2040. Pacifica and Half Moon Bay are expected to experience population growth rates of eight and nine percent, respectively.



## PRIORITY DEVELOPMENT AREAS

There are 15 Priority Development Areas (PDAs) in San Mateo County. Almost all of the PDAs are located along the El Camino Real corridor. There are no PDAs in the coastal subarea or unincorporated lands west of the mountains. Combined, the PDAs are projected to accommodate 76 percent of the county's household growth and 58 percent of job growth by 2040. All but one of the 14 jurisdictions with PDAs are planning to accommodate a majority of their household growth and at least 40 percent of their job growth within PDAs. Focusing future development in the PDAs of bayside communities will reduce development pressures on the many lower density residential neighborhoods and open space lands, including Priority Conservation Areas.

### Bayside Cities

The population of Daly City, the largest city in San Mateo County, is projected to grow by 20 percent between 2010 and 2040. Two of Daly City's PDAs center on El Camino Real and Mission Boulevard, while



Milbrae



San Mateo Bay Meadows Transit Neighborhood PDA



the third covers the Bayshore neighborhood. In the Bayshore PDA, redevelopment of properties around the Cow Palace offers the opportunity to increase the housing stock, employment, and neighborhood services.

Other cities in the northern portion of the county also will accommodate high levels of housing and job growth within PDAs over the projection period. For example, about 95 percent of San Bruno's projected job growth and of South San Francisco's household growth will occur in their PDAs. These two cities are each projected to grow by 38 percent over 2010 population levels.

Millbrae is projected to add over 3,000 households by 2040, of which 88 percent are planned within its PDA. The Millbrae Station Area PDA calls for intensifying retail, office, and residential uses, along with streetscape improvements to enhance connectivity around the multi-modal transit center (BART, Caltrain, and SamTrans bus service).

Burlingame is projected to add approximately 9,600

new residents, 3,800 households, and 8,200 jobs by 2040. The vast majority of this growth will occur in its PDA, which spans the El Camino corridor. Higher density residential and mixed use development will build upon already vibrant commercial districts in the city.

The city of San Mateo already has the most households in the county, but is projected to surpass Daly City as the largest city in terms of population by 2025, reaching 125,000 residents by 2040. The city of San Mateo will add over 10,000 new households and over 20,000 jobs. Its PDAs are located along El Camino, the Caltrain corridor, and in downtown. The Downtown PDA envisions high-intensity and mixed-use developments that incorporate multi-family housing.

It is anticipated that Redwood City's population will increase by 31 percent (or 24,000 residents) between 2010 and 2040. The city is also expected to add 19,000 more jobs, which would represent a 33 percent increase. Approximately 84 percent of household growth and 41 percent of job growth is



San Mateo Bay Meadows Transit Neighborhood PDA



Redwood City



East Palo Alto Ravenswood PDA

expected to occur in the city's three PDAs, which are centered on El Camino, downtown, and the Broadway/Veterans Boulevard Corridor. The vision for Downtown Redwood City is to become a major transit hub, cultural and entertainment center, dense residential neighborhood, destination for shopping and dining, and a dynamic workplace district.

East Palo Alto is projected to add over 1,000 jobs by 2040, a 38 percent increase over 2010 levels. Its population is expected to grow by over 7,300 residents, a 26 percent increase. The vision for its Ravenswood Business District PDA is to increase employment opportunities, housing options, and access to parks and the Bay shoreline. The residences will be accessible to other growing job centers through transportation linkages.

## San Mateo County Projections

	2010	2015	2020	2025	2030	2035	2040
Population	718,451	745,400	775,100	805,600	836,100	869,300	904,400
Household Population	709,598	736,500	765,400	795,800	825,400	857,700	892,000
Households	257,837	267,150	277,200	286,790	296,280	305,390	315,100
Persons Per Household	2.75	2.76	2.76	2.77	2.79	2.81	2.83
Employed Residents	342,060	368,790	398,220	406,310	413,740	425,830	438,770
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	2,220	2,270	2,330	2,170	2,050	1,920	1,810
Construction	14,600	16,180	17,910	18,260	18,610	19,090	19,580
Manufacturing & Wholesale	40,790	41,990	43,140	39,280	35,690	32,420	29,320
Retail	35,350	36,680	38,060	38,210	38,340	38,760	39,180
Transportation & Utilities	26,690	30,430	34,610	35,240	35,780	36,840	37,820
Information	19,260	24,080	29,810	30,270	30,730	31,680	32,650
Financial & Leasing	19,540	18,840	17,840	17,820	17,750	17,650	17,490
Professional & Managerial Services	66,610	75,080	84,560	88,960	93,550	99,280	105,280
Health & Educational Services	36,690	40,990	45,810	48,440	51,240	54,680	58,290
Arts, Recreation & Other Services	50,290	54,870	59,860	61,720	63,630	66,150	68,770
Government	33,150	33,530	33,620	33,870	34,130	34,510	34,880
<b>Total Jobs</b>	<b>345,190</b>	<b>374,940</b>	<b>407,550</b>	<b>414,240</b>	<b>421,500</b>	<b>432,980</b>	<b>445,070</b>

## Total Population

### Jurisdictional Boundary

	2010	2015	2020	2025	2030	2035	2040
ATHERTON	6,914	7,100	7,200	7,400	7,500	7,700	7,900
BELMONT	25,835	26,400	27,000	27,700	28,200	28,800	29,600
BRISBANE	4,282	4,400	4,500	4,600	4,800	4,900	5,100
BURLINGAME	28,806	30,200	31,700	33,200	34,800	36,600	38,400
COLMA	1,403	1,500	1,700	1,800	2,000	2,200	2,300
DALY CITY	101,123	104,000	107,100	110,300	113,700	117,500	121,400
EAST PALO ALTO	28,155	29,200	30,800	32,400	33,200	34,100	35,500
FOSTER CITY	30,567	31,000	31,600	32,300	32,700	33,300	33,900
HALF MOON BAY	11,324	11,400	11,700	12,100	12,200	12,300	12,400
HILLSBOROUGH	10,825	11,000	11,200	11,400	11,600	11,900	12,100
MENLO PARK	32,026	32,900	33,800	34,700	35,800	36,900	38,100
MILLBRAE	21,532	22,800	24,200	25,600	27,100	28,700	30,300
PACIFICA	37,234	37,600	38,200	39,000	39,200	39,600	40,300
PORTOLA VALLEY	4,353	4,400	4,500	4,600	4,700	4,800	4,900
REDWOOD CITY	76,815	80,300	84,000	87,800	91,900	96,300	100,800
SAN BRUNO	41,114	43,500	45,900	48,400	51,100	53,900	56,800
SAN CARLOS	28,406	29,200	30,100	31,000	31,900	32,900	34,000
SAN MATEO	97,207	101,500	106,000	110,500	115,400	120,600	126,000
SOUTH SAN FRANCISCO	63,632	67,200	71,000	74,800	78,800	83,200	87,700
WOODSIDE	5,287	5,300	5,400	5,500	5,600	5,600	5,700
UNINCORPORATED	61,611	64,500	67,500	70,500	73,900	77,500	81,200
<b>SAN MATEO COUNTY</b>	<b>718,451</b>	<b>745,400</b>	<b>775,100</b>	<b>805,600</b>	<b>836,100</b>	<b>869,300</b>	<b>904,400</b>

# Households

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
ATHERTON	2,330	2,370	2,420	2,460	2,500	2,540	2,580
BELMONT	10,575	10,770	11,020	11,260	11,430	11,580	11,790
BRISBANE	1,821	1,860	1,910	1,950	2,000	2,040	2,090
BURLINGAME	12,361	12,980	13,620	14,230	14,890	15,520	16,170
COLMA	412	450	490	530	580	620	660
DALY CITY	31,090	31,860	32,650	33,410	34,210	34,980	35,770
EAST PALO ALTO	6,940	7,170	7,500	7,810	7,960	8,100	8,340
FOSTER CITY	12,016	12,170	12,380	12,590	12,690	12,790	12,950
HALF MOON BAY	4,149	4,150	4,270	4,390	4,400	4,410	4,410
HILLSBOROUGH	3,693	3,750	3,800	3,850	3,900	3,960	4,010
MENLO PARK	12,347	12,700	13,070	13,420	13,790	14,150	14,520
MILLBRAE	7,994	8,500	9,010	9,490	10,020	10,530	11,050
PACIFICA	13,967	14,080	14,280	14,490	14,510	14,530	14,650
PORTOLA VALLEY	1,746	1,770	1,800	1,840	1,860	1,870	1,900
REDWOOD CITY	27,957	29,410	30,920	32,370	33,880	35,340	36,860
SAN BRUNO	14,701	15,430	16,190	16,900	17,670	18,410	19,170
SAN CARLOS	11,524	11,830	12,150	12,450	12,770	13,080	13,390
SAN MATEO	38,233	39,930	41,690	43,370	45,150	46,860	48,620
SOUTH SAN FRANCISCO	20,938	22,080	23,250	24,370	25,570	26,720	27,900
WOODSIDE	1,977	1,990	2,030	2,060	2,060	2,060	2,080
UNINCORPORATED	21,066	21,900	22,750	23,550	24,440	25,300	26,190
<b>SAN MATEO COUNTY</b>	<b>257,837</b>	<b>267,150</b>	<b>277,200</b>	<b>286,790</b>	<b>296,280</b>	<b>305,390</b>	<b>315,100</b>



## Total Jobs

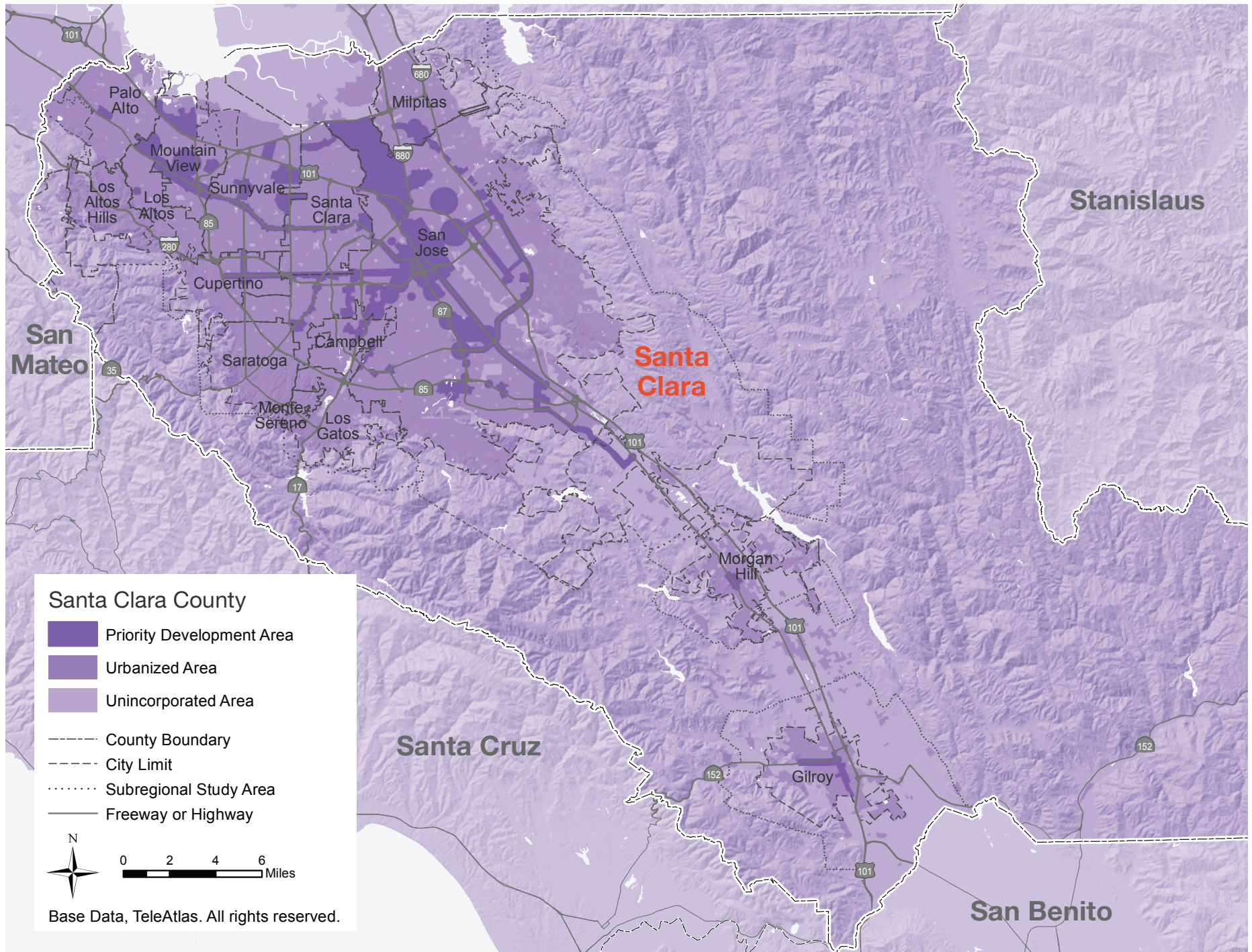
## Jurisdictional Boundary

	2010	2015	2020	2025	2030	2035	2040
ATHERTON	2,610	2,730	2,870	2,920	2,980	3,080	3,160
BELMONT	8,180	8,790	9,450	9,640	9,840	10,130	10,450
BRISBANE	6,780	7,320	7,890	7,790	7,690	7,680	7,670
BURLINGAME	29,540	31,910	34,470	35,090	35,740	36,740	37,780
COLMA	2,780	2,910	3,030	3,070	3,090	3,140	3,200
DALY CITY	20,760	22,300	23,960	24,460	25,000	25,780	26,580
EAST PALO ALTO	2,670	2,920	3,200	3,310	3,380	3,540	3,680
FOSTER CITY	13,780	14,810	15,920	16,190	16,470	16,900	17,350
HALF MOON BAY	5,030	5,330	5,650	5,710	5,770	5,900	6,020
HILLSBOROUGH	1,850	1,950	2,040	2,080	2,130	2,200	2,250
MENLO PARK	28,890	30,910	33,060	33,310	33,660	34,280	34,980
MILLBRAE	6,870	7,480	8,140	8,370	8,620	8,950	9,300
PACIFICA	5,870	6,210	6,560	6,650	6,770	6,930	7,100
PORTOLA VALLEY	1,500	1,580	1,660	1,680	1,700	1,750	1,770
REDWOOD CITY	58,080	64,160	70,960	72,090	73,330	75,340	77,480
SAN BRUNO	12,710	13,800	15,010	15,390	15,810	16,360	16,950
SAN CARLOS	15,870	17,070	18,370	18,520	18,670	19,010	19,370
SAN MATEO	52,540	57,700	63,430	65,350	67,380	70,090	72,950
SOUTH SAN FRANCISCO	43,550	47,350	51,510	51,720	52,010	52,870	53,790
WOODSIDE	1,760	1,840	1,940	1,970	1,990	2,010	2,060
UNINCORPORATED	23,570	25,870	28,430	28,930	29,470	30,300	31,180
<b>SAN MATEO COUNTY</b>	<b>345,190</b>	<b>374,940</b>	<b>407,550</b>	<b>414,240</b>	<b>421,500</b>	<b>432,980</b>	<b>445,070</b>

San Mateo County Priority Development Areas	Place Type	Population		Households		Jobs	
		2010	2040	2010	2040	2010	2040
Belmont Villages of Belmont	Mixed-Use Corridor	1,920	3,980	890	1,790	1,250	2,500
Burlingame Burlingame El Camino Real	Transit Town Center	15,430	23,440	7,170	10,530	12,290	17,920
Daly City Mission Boulevard	Mixed-Use Corridor	7,020	11,310	2,070	3,210	3,770	5,200
Daly City Bayshore	Transit Town Center	5,730	13,390	1,550	3,510	1,100	3,230
East Palo Alto Ravenswood	Transit Town Center	4,680	9,130	970	1,830	790	1,210
Menlo Park El Camino Real Corridor and Downtown	Transit Town Center	1,870	3,750	1,010	1,980	5,620	7,650
Millbrae Transit Station Area	Mixed-Use Corridor	780	6,980	270	2,650	1,340	3,370
Redwood City Downtown	City Center	3,130	14,180	990	6,180	10,430	14,060
Redwood City BroadwayVeterans Boulevard Corridor	Mixed-Use Corridor	1,900	6,420	730	2,250	8,480	11,900
San Bruno Transit Corridors	Mixed-Use Corridor	13,270	24,960	4,140	7,450	6,620	10,520
Brisbane San Francisco/San Mateo Bi-County Area (with San Francisco)	Suburban Center	0	0	0	0	500	960
San Mateo Downtown	City Center	1,060	3,200	500	1,560	4,370	6,970
San Mateo Rail Corridor	Transit Neighborhood	1,220	12,670	500	5,080	8,810	18,590
South San Francisco Downtown	Transit Town Center	5,250	16,440	1,510	4,600	2,530	6,800
<b>El Camino Real:</b>							
Daly City *	Mixed-Use Corridor	19,940	25,770	5,570	7,000	3,820	5,210
Colma	Mixed-Use Corridor	1,340	2,250	390	640	2,120	2,400
South San Francisco	Mixed-Use Corridor	14,530	24,880	5,450	8,970	4,740	6,120
San Bruno *	Mixed-Use Corridor	12,100	20,210	4,150	6,730	7,190	10,290
Millbrae *	Mixed-Use Corridor	6,910	12,620	2,730	4,950	4,560	6,280
San Mateo *	Mixed-Use Corridor	26,970	44,000	12,490	19,400	17,100	29,020
San Carlos *	Mixed-Use Corridor	7,250	10,610	3,350	4,600	10,040	12,350
Redwood City *	Mixed-Use Corridor	13,270	20,160	4,560	6,830	7,360	9,670
Menlo Park *	Mixed-Use Corridor	5,170	7,400	2,650	3,730	5,520	7,510
Uninc Daly City	Mixed-Use Corridor	760	980	320	400	300	410
North Fair Oaks	Mixed-Use Corridor	8,430	22,010	2,400	6,030	3,600	5,650
Unincorporated County	Mixed-Use Corridor	160	290	40	80	610	680
* Indicates C/CAG El Camino Real PDAs that overlap with another PDA. Job totals may duplicate jobs already listed in that city.							

Viii.

Santa Clara  
County





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# Santa Clara County

Santa Clara County was once known as the Valley of Heart's Delight due to its agricultural heritage and food processing industries. It is now home to Silicon Valley, the birthplace and global capital of the high-technology sector. In the last 40 years, Santa Clara County has experienced explosive population and job growth. In 2010, the county had nearly 1.8 million residents and over 900,000 jobs, making it the most populous and job-rich county in the San Francisco Bay Area. The county is projected to take on 31 percent of the region's total household growth and 27 percent of its job growth by 2040. Much of this will occur in the county's PDAs.

Most cities are concentrated in the northwestern portion of the county, with the most populous cities adjacent to the San Francisco Bay. Morgan Hill and Gilroy are located along US Highway 101 to the south, while the remaining jurisdictions are located along the western side of the Santa Clara Valley adjacent to the Santa Cruz Mountains. Several rail systems serve the county including Caltrain, Altamont Commuter Express (ACE), Capitol Corridor, and the Valley Transportation Authority (VTA) light rail network. VTA also provides express and local bus service.



San Jose Farmer's Market



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## ECONOMY

In addition to the high concentration of the semiconductor and computer industries, Santa Clara County's economy also involves electronics, aerospace, medical devices, software, social media, and other internet-related industries. The county has 15 Fortune 500 companies all in the technology sector, including Apple, Hewlett Packard, Intel, and Google. As of 2010, the employers with the largest number of Silicon Valley workers were Cisco Systems, County of Santa Clara, and Kaiser Permanente Northern California.

Silicon Valley's technology cluster incorporates various sectors including Manufacturing, Information, and Professional Services. In 2010, the Manufacturing and Wholesale sector supported the highest share of Santa Clara County jobs (22 percent), while the Professional and Managerial sector made up 19 percent. The county provides 44 percent of the Bay Area's jobs in Manufacturing and Wholesale, 39 percent of its Information jobs, and 30 percent of its Professional and Managerial Services.

Santa Clara County is projected to experience a net increase of 300,000 jobs between 2010 and 2040, representing a 33 percent increase. Consistent with regional trends, about 37 percent of all new jobs are projected to be in Professional and Managerial Services, while the Health and Educational Services category will account for an additional 27 percent of job growth. The share of jobs in Manufacturing and Wholesale is anticipated to decrease to 17 percent by 2040. Although the sector may experience a net increase of jobs due to growth of 11,700 jobs in first 10 years, the sector is projected to lose over 8,800 between 2020 and 2040 due to national and regional shifts in the industry structure.

San José accounts for 49 percent of the county's projected job growth over the next 30 years, while the next five largest cities in terms of

employment (Sunnyvale, Santa Clara, Mountain View, Milpitas, and Palo Alto) account for a combined 37 percent. San José is also estimated to have the highest rate of employment growth with a 39 percent increase, followed by Palo Alto and Mountain View (each with a 33 percent increase).

## POPULATION

The population of Santa Clara County is estimated to grow by 36 percent, reaching 2.4 million people by 2040. San José, the largest city in the Bay Area, is projected to add the most residents in absolute terms (over 388,000), Milpitas is projected to grow by the largest percentage (63 percent). Both Milpitas and Mountain View are expected to pass the 100,000 mark by 2040, joining Santa Clara and Sunnyvale. The jurisdictions with populations less than 30,000 (Los Gatos, Los Altos, Los Altos Hills, Monte Sereno, and Saratoga) are projected to experience the lowest rates of population growth (13 percent or less).

By 2040, the number of households in the county is projected to increase by over 214,000. The 35 percent increase represents the fastest projected growth rate of all counties in the Bay Area. San José accounts for 61 percent of the county's projected household growth, while the next five largest cities (Sunnyvale, Santa Clara, Mountain View, Milpitas, and Palo Alto) account for a combined 30 percent.

## PRIORITY DEVELOPMENT AREAS

There are 37 Priority Development Areas (PDAs) spread over nine of the 15 cities in Santa Clara County. The jurisdictions with PDAs include the two south county cities (Morgan Hill and Gilroy) and the seven cities located near the Bay. Combined, the PDAs are projected to accommodate 80 percent of the county's household growth and 56 percent of job growth by 2040. The PDAs focus on existing downtowns, rail stations, and the El Camino Real corridor. VTA has designated a "Cores, Corridors & Station Areas" PDA that covers multiple areas throughout the county including unincorporated lands. These areas present important opportunities to meet Silicon Valley's housing needs while improving the viability of transit.

There are currently no PDAs in the smaller jurisdictions located along the foothills of the Santa Cruz Mountains (Los Altos Hills, Los Altos, Cupertino, Saratoga, Monte Sereno, and Los Gatos). Together the six jurisdictions without a PDA are projected to take on three percent of the county's household



San Jose Diridon Station PDA



Mountain View San Antonio PDA

growth and six percent of its job growth between 2010 and 2040.

### Bayside Cities

San José will continue to take on much of the county's growth over the projection period. The city's population is projected to exceed 1 million by 2015 and 1.3 million by 2040, growing by 41 percent over 2010 levels. About 95 percent of the city's projected household growth and 84 percent of its job growth is planned for its 19 PDAs. The two Regional Center PDAs (Greater Downtown and North San José) are planned to accommodate the most growth. The vision for the downtown area is to continue its transformation into a vibrant, pedestrian-friendly urban environment with new office space, housing options, and hotels, leveraging existing transit and the planned BART and California High Speed Rail stops in downtown and at Diridon Station. The vision for North San José includes infill development of a mix of higher density residential, retail, and technology-related industrial uses.

Sunnyvale is projected to add over 19,000 households, approximately 74 percent of which will be developed within its five PDAs. The El Camino Real Corridor PDA builds on the long range Grand Boulevard Initiative to encourage housing and job growth, high quality design, and pedestrian-oriented environments.

The city of Santa Clara is projected to add approximately 40,000 new residents and 33,000 new jobs by 2040. About half of its projected population growth will occur in its PDAs, which focus on the El Camino Real corridor and Santa Clara train station that is planned to include BART service.

As the fastest growing city in the county, Milpitas is projected to add more than 42,000 people between 2010 and 2040. About 58 percent of new households will be located in the city's Milpitas Transit Area PDA, which will be served by BART and is linked to VTA's light rail network. Redevelopment of this area will help promote a compact, walkable urban form that supports increased transit use.



Milpitas Transit Area PDA

About 91 percent of new households between 2010 and 2040 in Palo Alto are projected to be accommodated in its California Avenue PDA. Mountain View's PDAs cover five transit-oriented areas including Downtown, Whisman Station, San Antonio Center, El Camino Real, and North Bayshore. The PDAs are expected to accommodate about 86 percent of new households and 71 percent of new jobs in the city.

The city of Campbell is projected to experience 22 percent population growth and 29 percent job growth by 2040. The Central Redevelopment Area PDA covers the areas around Campbell's historic downtown and three light rail stations. The PDA is expected to accommodate 45 percent of the new households and 30 percent of the new jobs.

## South County

The south county cities of Morgan Hill and Gilroy have each designated their downtowns as a PDA. Gilroy's PDA will integrate the scale and architecture of downtown with urban design principles to create a unique retail district. The focus in Morgan Hill is on



Milpitas Transit Area PDA

making downtown the social and activity heart of the community, supported by pedestrian-friendly landscaping and infrastructure improvements.



## Santa Clara County Projections

	2010	2015	2020	2025	2030	2035	2040
Population	1,781,642	1,877,700	1,977,900	2,080,600	2,188,500	2,303,500	2,423,500
Household Population	1,751,292	1,845,800	1,944,800	2,045,800	2,152,100	2,263,900	2,381,000
Households	604,204	639,160	675,670	710,610	747,070	782,120	818,400
Persons Per Household	2.90	2.89	2.88	2.88	2.88	2.89	2.91
Employed Residents	802,030	881,770	968,790	1,003,550	1,039,330	1,085,880	1,133,950
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	4,530	4,640	4,710	4,400	4,120	3,700	3,340
Construction	33,590	38,250	43,570	44,610	45,660	47,100	48,580
Manufacturing & Wholesale	203,800	209,580	215,540	212,350	209,240	207,990	206,730
Retail	84,280	89,570	95,230	95,860	96,470	98,090	99,760
Transportation & Utilities	12,950	14,690	16,590	16,870	17,130	17,600	18,070
Information	47,480	52,080	57,100	57,520	57,940	58,810	59,690
Financial & Leasing	32,490	35,340	38,390	38,580	38,710	39,200	39,620
Professional & Managerial Services	177,220	201,350	228,820	241,410	254,700	271,030	288,450
Health & Educational Services	122,420	137,940	156,630	166,420	176,940	189,660	203,410
Arts, Recreation & Other Services	106,750	118,920	132,830	137,870	143,090	149,920	157,070
Government	100,760	101,420	101,860	102,430	103,020	103,910	104,800
<b>Total Jobs</b>	<b>926,270</b>	<b>1,003,780</b>	<b>1,091,270</b>	<b>1,118,320</b>	<b>1,147,020</b>	<b>1,187,010</b>	<b>1,229,520</b>



## Total Population

## Jurisdictional Boundary

	2010	2015	2020	2025	2030	2035	2040
CAMPBELL	39,349	40,600	41,900	43,300	44,800	46,400	48,100
CUPERTINO	58,302	60,200	62,100	64,100	66,300	68,700	71,200
GILROY	48,821	50,700	52,800	55,100	57,000	59,000	61,400
LOS ALTOS	28,976	29,500	30,200	30,900	31,400	32,100	32,800
LOS ALTOS HILLS	7,922	8,000	8,200	8,400	8,400	8,500	8,600
LOS GATOS	29,413	29,700	30,500	31,500	31,800	32,200	32,600
MILPITAS	66,790	73,100	79,600	86,300	93,600	101,200	109,100
MONTE SERENO	3,341	3,400	3,500	3,600	3,600	3,600	3,700
MORGAN HILL	37,882	39,900	41,900	43,900	46,100	48,400	50,800
MOUNTAIN VIEW	74,066	78,000	82,000	86,100	90,500	95,200	100,000
PALO ALTO	64,403	67,400	70,500	73,700	77,100	80,800	84,600
SAN JOSE	945,942	1,004,500	1,064,900	1,126,200	1,192,100	1,261,600	1,334,100
SANTA CLARA	116,468	122,500	128,700	135,000	141,700	149,000	156,500
SARATOGA	29,926	30,100	30,800	31,600	31,900	32,300	32,700
SUNNYVALE	140,081	148,400	156,800	165,500	174,700	184,300	194,300
UNINCORPORATED	89,960	91,700	93,500	95,400	97,500	100,200	103,000
<b>SANTA CLARA COUNTY</b>	<b>1,781,642</b>	<b>1,877,700</b>	<b>1,977,900</b>	<b>2,080,600</b>	<b>2,188,500</b>	<b>2,303,500</b>	<b>2,423,500</b>

## Households

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
CAMPBELL	16,163	16,700	17,250	17,780	18,340	18,880	19,440
CUPERTINO	20,181	20,810	21,460	22,080	22,750	23,380	24,040
GILROY	14,175	14,650	15,200	15,740	16,160	16,560	17,050
LOS ALTOS	10,745	10,930	11,170	11,400	11,530	11,660	11,850
LOS ALTOS HILLS	2,829	2,830	2,900	2,970	2,970	2,970	2,980
LOS GATOS	12,355	12,450	12,760	13,070	13,120	13,170	13,220
MILPITAS	19,184	21,230	23,330	25,340	27,490	29,560	31,680
MONTE SERENO	1,211	1,220	1,250	1,280	1,290	1,290	1,300
MORGAN HILL	12,326	12,950	13,590	14,200	14,860	15,500	16,150
MOUNTAIN VIEW	31,957	33,570	35,240	36,830	38,510	40,130	41,800
PALO ALTO	26,493	27,780	29,110	30,380	31,730	33,030	34,370
SAN JOSE	301,366	322,770	344,750	365,770	388,220	409,800	432,030
SANTA CLARA	43,021	45,350	47,760	50,050	52,490	54,830	57,260
SARATOGA	10,734	10,790	11,000	11,220	11,270	11,310	11,360
SUNNYVALE	53,384	56,560	59,840	62,970	66,290	69,490	72,800
UNINCORPORATED	28,080	28,570	29,060	29,530	30,050	30,560	31,070
<b>SANTA CLARA COUNTY</b>	<b>604,204</b>	<b>639,160</b>	<b>675,670</b>	<b>710,610</b>	<b>747,070</b>	<b>782,120</b>	<b>818,400</b>

## Total Jobs

## Jurisdictional Boundary

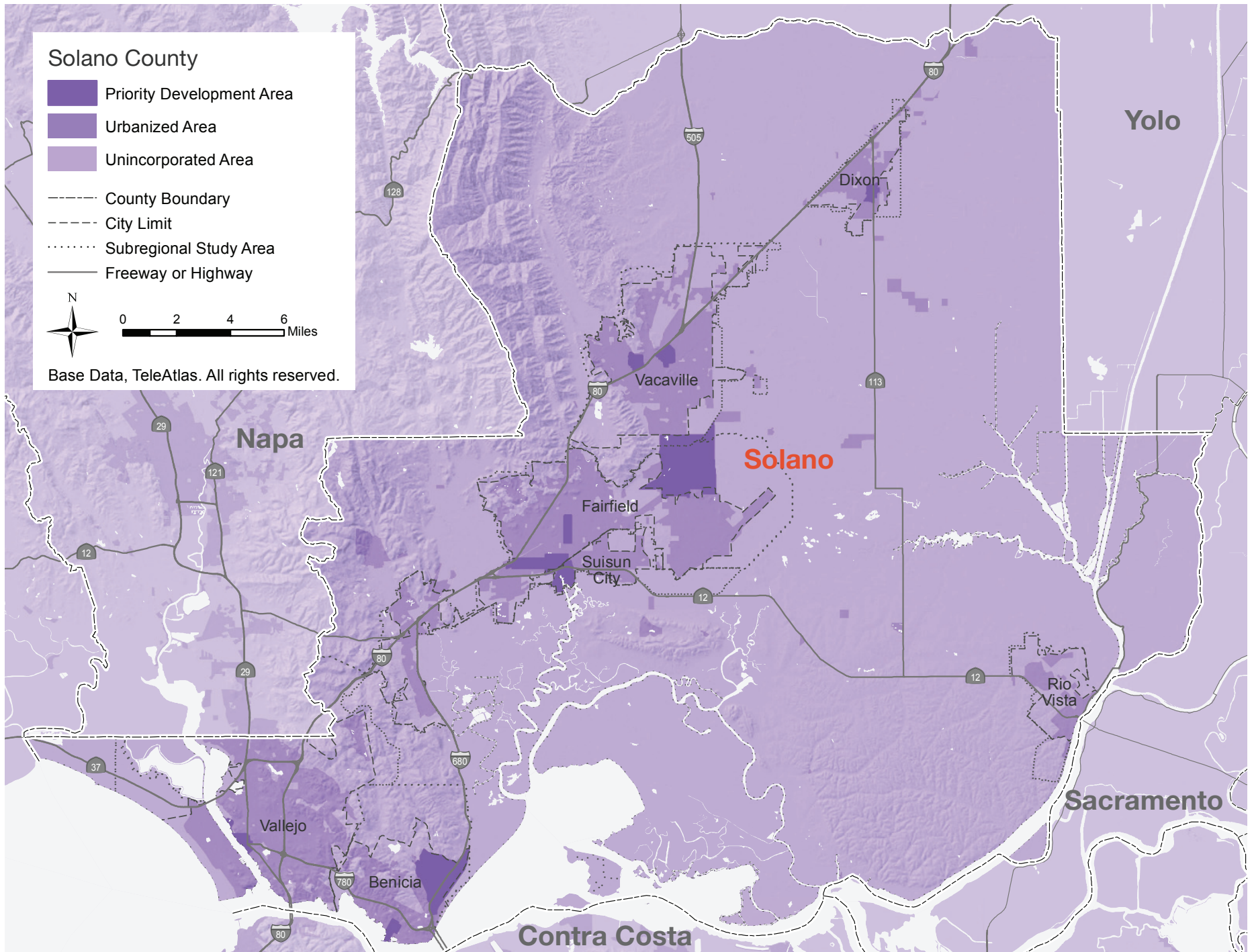
	2010	2015	2020	2025	2030	2035	2040
CAMPBELL	27,320	29,410	31,690	32,400	33,120	34,110	35,170
CUPERTINO	26,090	27,950	29,960	30,580	31,220	32,150	33,110
GILROY	17,650	18,790	20,020	20,400	20,780	21,370	21,960
LOS ALTOS	14,760	15,660	16,610	16,950	17,290	17,760	18,240
LOS ALTOS HILLS	2,060	2,180	2,310	2,350	2,410	2,470	2,540
LOS GATOS	23,630	25,000	26,460	26,980	27,530	28,280	29,040
MILPITAS	45,190	48,660	52,520	53,480	54,530	56,120	57,810
MONTE SERENO	450	470	530	530	550	560	580
MORGAN HILL	17,570	18,820	20,170	20,540	20,920	21,520	22,140
MOUNTAIN VIEW	47,950	52,040	56,550	57,940	59,390	61,440	63,590
PALO ALTO	89,690	96,900	104,820	107,820	110,940	115,110	119,470
SAN JOSE	377,140	414,380	456,260	469,740	484,000	503,620	524,510
SANTA CLARA	112,890	121,950	131,960	134,650	137,480	141,700	146,180
SARATOGA	9,910	10,360	10,840	10,990	11,170	11,390	11,640
SUNNYVALE	74,810	80,490	86,740	88,380	90,160	92,790	95,600
UNINCORPORATED	39,160	40,720	43,830	44,590	45,530	46,620	47,940
<b>SANTA CLARA COUNTY</b>	<b>926,270</b>	<b>1,003,780</b>	<b>1,091,270</b>	<b>1,118,320</b>	<b>1,147,020</b>	<b>1,187,010</b>	<b>1,229,520</b>

Santa Clara County Priority Development Areas	Place Type	Population		Households		Jobs	
		2010	2040	2010	2040	2010	2040
Campbell Central Redevelopment Area	Transit Neighborhood	2,600	5,850	1,260	2,750	7,900	10,250
Gilroy Downtown	Transit Town Center	3,410	11,200	880	2,820	2,380	3,620
Morgan Hill Downtown	Transit Town Center	1,590	5,730	510	1,930	1,670	3,010
Milpitas Transit Area	Suburban Center	1,900	21,370	750	7,730	5,270	9,600
Mountain View Whisman Station	Transit Neighborhood	1,620	4,270	650	1,640	650	1,210
Mountain View Downtown	Transit Town Center	9,890	12,850	4,790	6,030	9,450	10,310
Mountain View San Antonio Center	Transit Town Center	7,910	14,850	3,420	6,180	3,160	4,340
Mountain View El Camino Real Corridor	Mixed-Use Corridor	19,630	25,120	8,740	10,830	5,790	6,660
Mountain View North Bayshore	Suburban Center	820	4,290	350	1,750	7,400	15,110
Palo Alto California Avenue	Transit Neighborhood	1,390	3,070	750	1,600	3,390	5,060
Santa Clara El Camino Real Focus Area	Mixed-Use Corridor	4,010	13,140	1,650	5,220	4,400	6,990
Santa Clara Santa Clara Station Focus Area	City Center	1,030	8,180	450	3,810	10,070	12,820
San Jose Greater Downtown	Regional Center	7,130	38,040	3,670	19,310	28,250	56,410
San Jose Cottle Transit Village	Suburban Center	0	11,070	0	3,510	2,550	3,040
San Jose North San Jose	Regional Center	24,440	105,140	10,420	42,830	84,660	130,760
San Jose Downtown "Frame"	City Center	50,150	82,250	16,980	27,410	26,930	31,320
San Jose Berryessa Station	Transit Neighborhood	6,350	27,620	1,850	7,850	6,150	12,220
San Jose Communications Hill	Transit Town Center	17,360	26,990	6,540	9,910	3,940	5,660
San Jose West San Carlos & Southwest Expressway Corridors	Mixed-Use Corridor	25,360	51,860	10,320	20,420	8,970	15,660
San Jose East Santa Clara/Alum Rock Corridor	Mixed-Use Corridor	23,710	46,900	6,750	12,980	10,020	13,460
San Jose Stevens Creek TOD Corridor	Mixed-Use Corridor	5,570	17,390	2,500	7,630	5,690	8,040
San Jose Oakridge/Almaden Plaza Urban Village	Suburban Center	4,540	23,220	1,790	9,030	5,440	9,710
San Jose Capitol/Tully/King Urban Villages	Suburban Center	3,970	12,360	1,060	3,270	4,090	7,090
San Jose Saratoga TOD Corridor	Mixed-Use Corridor	5,130	7,880	2,340	3,470	3,530	5,540
San Jose Winchester Boulevard TOD Corridor	Mixed-Use Corridor	13,020	19,320	4,630	6,690	4,060	6,850
San Jose Bascom TOD Corridor	Mixed-Use Corridor	1,930	6,320	650	2,190	11,530	12,920
San Jose Bascom Urban Village	Mixed-Use Corridor	3,720	5,810	1,670	2,520	1,710	2,670
San Jose Camden Urban Village	Mixed-Use Corridor	1,180	3,740	480	1,460	5,610	7,640
San Jose Blossom Hill/Snell Urban Village	Mixed-Use Corridor	1,750	5,020	610	1,690	880	1,720
San Jose Capitol Corridor Urban Villages	Mixed-Use Corridor	2,620	23,190	820	6,960	2,340	5,590
San Jose Westgate/El Paseo Urban Village	Suburban Center	1,810	7,830	800	3,270	3,440	5,240
Sunnyvale Lawrence Station Transit Village	Transit Neighborhood	3,860	11,210	1,560	4,330	4,170	5,110
Sunnyvale Downtown & Caltrain Station	Transit Town Center	3,640	8,220	1,730	3,710	3,760	5,680
Sunnyvale El Camino Real Corridor	Mixed-Use Corridor	25,170	37,560	10,350	14,940	13,220	16,500
Sunnyvale East Sunnyvale	Urban Neighborhood	2,360	10,270	950	4,170	8,070	9,260
Sunnyvale Tasman Station ITR	Mixed-Use Corridor	3,340	7,980	1,390	3,200	1,550	2,530
<b>Valley Transportation Authority:</b>							
Cupertino VTA City Cores, Corridors & Station Areas	Mixed-Use Corridor	7,800	14,610	2,980	5,400	10,540	13,780
Gilroy VTA City Cores, Corridors & Station Areas	Mixed-Use Corridor	5,030	5,400	1,730	1,800	2,380	2,990
Los Altos VTA City Cores, Corridors & Station Areas	Mixed-Use Corridor	1,550	2,640	700	1,160	5,690	7,250
Milpitas VTA City Cores, Corridors & Station Areas	Mixed-Use Corridor	3,810	6,660	450	760	310	510
San Jose VTA City Cores, Corridors & Station Areas	Mixed-Use Corridor	82,830	103,480	24,880	30,100	22,590	24,880
Santa Clara VTA City Cores, Corridors & Station Areas	Mixed-Use Corridor	4,970	8,980	1,970	3,440	10,320	14,520

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## Solano County





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# Solano County

Solano County has a large share of the region's important farmland and wetlands, although the county has been urbanizing over the last several decades. The county has experienced substantial growth in the retail sector, with shopping centers located near Interstate 80, serving the growing local population as well as people passing between the Bay Area and Sacramento. Solano County is also home to military bases and tourist attractions such as Six Flags amusement park.

Population is concentrated in the central and southern parts of the county. The cities of Vallejo and Benicia are located in the southern portion of the county adjacent to the delta, while Fairfield, Vacaville, and Suisun City are clustered in the center. The small towns of Dixon and Rio Vista are located in the northern and eastern portion of the county, respectively.

Solano County is projected to take on about four percent of the region's total household and job growth. Transit service includes Capitol Corridor (Amtrak), ferry service to San Francisco, and bus service provided by Solano Transit Authority.



Vallejo Waterfront

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## ECONOMY

Solano County's economy has historically been based upon the manufacturing, distribution, food processing, warehousing, and transportation industries. Major employers include the Budweiser brewery, Jelly Belly candy factory, and the Valero oil refinery. Travis Air Force Base has also been important to the economy, handling more cargo and passengers than any other military air terminal in the country. The county has above average shares in the Retail and Government sectors with 14 and 20 percent respectively (compared to 10 and 15 percent regionwide).

Between 2010 and 2040, Solano County is projected to add about 47,600 jobs. This estimated 36 percent growth in employment is the second highest growth rate in the Bay Area (slightly behind Alameda

County). The Construction sector is projected to see the most percentage growth in employment (75 percent). Nearly half of the new jobs will be Health and Educational Services and Professional and Managerial Services.

It is anticipated that all cities in the county will experience job increases of 30 percent or more. Of all Solano County jurisdictions, Suisun City is expected to have the largest percentage growth in jobs with 47 percent. Fairfield, Vallejo, and Vacaville will accommodate the most absolute number of jobs, together accounting for about three-quarters of the county's projected job growth (77 percent).

## POPULATION

The population of Solano County is projected to exceed 500,000 by 2040, an addition of almost 100,000 residents, representing a 24

percent increase. Fairfield is expected to have the largest percentage and absolute increases in population, taking 42 percent of the county's growth. Fairfield is expected to exceed 124,000 residents, surpassing Vallejo as the county's largest city by 2025. Dixon will likely experience the lowest population growth rate (13 percent). As of 2010, only five percent of the county's population currently lived in unincorporated areas, although the unincorporated population is projected to increase by 31 percent.

By 2040, the number of households is projected to increase by 27,000. Together the cities of Fairfield, Vacaville, and Vallejo will account for about 78 percent of the county's household growth.





## PRIORITY DEVELOPMENT AREAS

There are 10 Priority Development Areas (PDAs) in Solano County, including at least one in every city except Rio Vista, which has a Rural Community Investment Area. Combined, the PDAs are projected to accommodate 55 percent of the county's household growth and 24 percent of job growth by 2040.

### Central County

Together, the cities of Fairfield, Vacaville, and Suisun City are projected to account for 70 percent of the county's population growth and 56 percent of job growth between 2010 and 2040. Fairfield is projected to add approximately 41,000 new residents and 14,000 new jobs, with substantial increases in service jobs. About 89 percent of the new households and 42 percent of new jobs will be developed in its four PDAs. The PDAs are served by transit such as the existing Suisun City-Fairfield and future Fairfield-Vacaville Capitol Corridor stations and will support higher density housing, mixed use development, and neighborhood-serving retail.



Downtown Vacaville PDA



Suisun City

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Vacaville, Solano County's third largest city, is projected to grow by 23 percent, reaching a population of 114,000 by 2040. Suisun City is projected to add over 5,600 residents and 1,400 jobs by 2040. The city is expected to see growth in health, education, and retail jobs to serve the growing local demand. Much of the city's projected growth will occur in its PDA, including 68 percent of new households and 64 percent of new jobs. The downtown PDA is anticipated to incorporate waterfront recreation, compact multi-family housing, retail and entertainment uses, open space, and a modern transit center with connections to bicycle/pedestrian trails.

## **South County**

About one-fifth of the county's population growth and one-third of job growth are projected to occur in Vallejo and Benicia. Vallejo is projected to experience a relatively low rate of household growth (11 percent), while the number of jobs in the city is projected to increase by 36 percent. The city has designated a PDA for its downtown and waterfront, to promote higher-density residential development and

new open spaces, while retaining the historic character of the area.

The population of Benicia is projected to grow by 16 percent, accommodating over 1,500 new households and 4,600 jobs. A substantial amount of its projected population growth will occur in its PDA: about 61 percent of new households. Only 6 percent of the city's employment growth is in the PDA, while 90 percent of new jobs will concentrate in the Benicia Gateway Employment Investment Area. Downtown Benicia is envisioned as a walkable transit town center with a wide range of housing types and a mix of office and institutional uses such as retail, churches, libraries, public spaces, and recreation.

## **Rural Areas**

Dixon, and unincorporated county lands will accommodate about 8 percent of the county's population and household growth, and 9 percent of job growth. Dixon is planning to accommodate about 47 percent of new households within its downtown PDA.





Vallejo Transit Terminal



Vallejo Transit Terminal

## Solano County Projections

	2010	2015	2020	2025	2030	2035	2040
Population	413,344	427,300	442,700	459,200	475,200	492,700	511,600
Household Population	400,892	414,200	428,500	443,700	458,200	474,100	491,400
Households	141,758	146,140	151,010	155,710	160,030	164,160	168,700
Persons Per Household	2.83	2.83	2.84	2.85	2.86	2.89	2.91
Employed Residents	178,900	193,010	208,590	212,950	216,960	223,380	230,300
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	1,900	1,940	1,980	1,900	1,800	1,720	1,630
Construction	7,850	9,680	11,770	12,170	12,590	13,150	13,740
Manufacturing & Wholesale	14,400	14,800	15,260	15,450	15,680	15,980	16,330
Retail	17,870	18,330	18,830	18,880	18,920	19,070	19,210
Transportation & Utilities	4,990	5,060	5,140	5,150	5,160	5,190	5,210
Information	1,720	1,710	1,700	1,700	1,690	1,690	1,690
Financial & Leasing	4,970	5,670	6,460	6,510	6,550	6,660	6,780
Professional & Managerial Services	12,360	14,000	15,880	16,740	17,640	18,780	19,960
Health & Educational Services	21,110	24,170	27,650	29,540	31,540	33,970	36,590
Arts, Recreation & Other Services	18,560	20,130	21,830	22,470	23,120	23,990	24,880
Government	26,610	27,640	28,630	29,650	30,720	32,270	33,920
<b>Total Jobs</b>	<b>132,340</b>	<b>143,130</b>	<b>155,130</b>	<b>160,160</b>	<b>165,410</b>	<b>172,470</b>	<b>179,940</b>

## Total Population

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
BENICIA	26,997	27,600	28,300	29,000	29,700	30,500	31,400
DIXON	18,351	18,700	19,000	19,400	19,800	20,200	20,700
FAIRFIELD	105,321	111,500	117,900	124,400	131,400	138,800	146,500
RIO VISTA	7,360	7,500	7,900	8,300	8,400	8,600	8,800
SUISUN CITY	28,111	28,900	29,800	30,700	31,600	32,600	33,700
VACAVILLE	92,428	95,300	98,200	101,700	105,500	109,700	114,000
VALLEJO	115,942	118,100	121,000	124,200	126,200	128,600	131,800
UNINCORPORATED	18,834	19,700	20,600	21,500	22,600	23,700	24,700
<b>SOLANO COUNTY</b>	<b>413,344</b>	<b>427,300</b>	<b>442,700</b>	<b>459,200</b>	<b>475,200</b>	<b>492,700</b>	<b>511,600</b>

## Households

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
BENICIA	10,686	10,940	11,200	11,450	11,720	11,980	12,250
DIXON	5,856	5,950	6,060	6,160	6,250	6,330	6,430
FAIRFIELD	34,484	36,440	38,450	40,380	42,430	44,400	46,430
RIO VISTA	3,454	3,500	3,660	3,830	3,870	3,910	3,950
SUISUN CITY	8,918	9,180	9,450	9,720	9,970	10,220	10,490
VACAVILLE	31,092	31,870	32,670	33,430	34,260	35,050	35,860
VALLEJO	40,559	41,270	42,260	43,220	43,710	44,160	44,900
UNINCORPORATED	6,709	6,990	7,260	7,520	7,820	8,110	8,390
<b>SOLANO COUNTY</b>	<b>141,758</b>	<b>146,140</b>	<b>151,010</b>	<b>155,710</b>	<b>160,030</b>	<b>164,160</b>	<b>168,700</b>

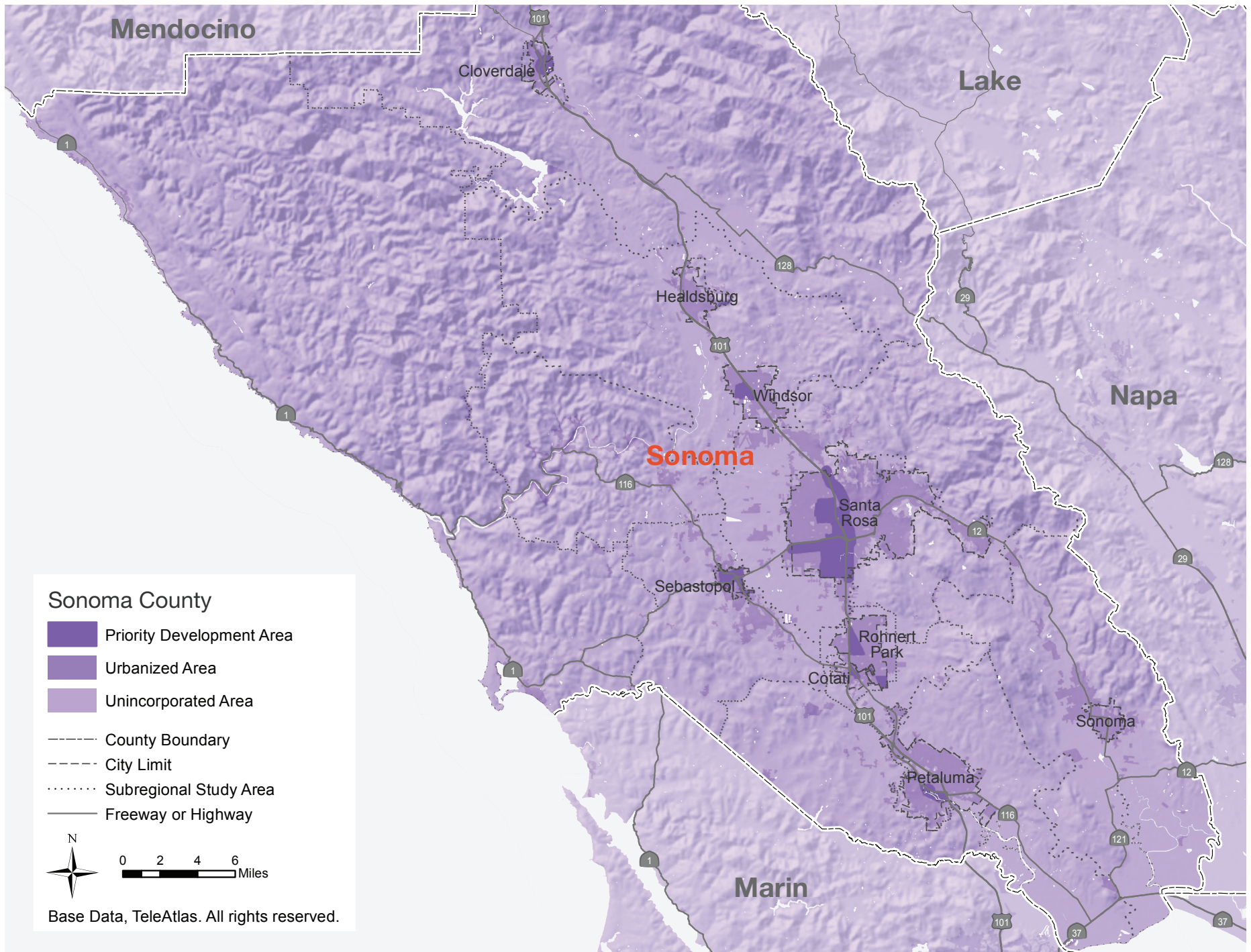
Total Jobs	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
BENICIA	14,240	15,380	16,650	17,120	17,610	18,250	18,930
DIXON	4,460	4,780	5,130	5,270	5,390	5,580	5,780
FAIRFIELD	39,300	42,450	45,950	47,440	49,010	51,110	53,310
RIO VISTA	1,790	1,930	2,100	2,150	2,190	2,260	2,340
SUISUN CITY	3,080	3,420	3,810	3,940	4,090	4,310	4,520
VACAVILLE	29,800	32,220	34,860	36,120	37,420	39,220	41,120
VALLEJO	31,660	34,230	37,090	38,320	39,610	41,280	43,070
UNINCORPORATED	8,010	8,720	9,540	9,800	10,090	10,460	10,870
<b>SOLANO COUNTY</b>	<b>132,340</b>	<b>143,130</b>	<b>155,130</b>	<b>160,160</b>	<b>165,410</b>	<b>172,470</b>	<b>179,940</b>

Solano County Priority Development Areas	Place Type	Population		Households		Jobs	
		2010	2040	2010	2040	2010	2040
Benicia Downtown	Transit Neighborhood	1,060	3,080	530	1,480	2,540	2,840
Benicia Northern Gateway	Empl. Investment Area	0	0	0	0	6,780	10,930
Dixon Downtown	Transit Town Center	2,010	2,890	690	960	560	830
Fairfield Downtown South (Jefferson Street)	Suburban Center	2,360	4,270	600	1,060	2,970	4,280
Fairfield Fairfield-Vacaville Train Station	Transit Town Center	280	19,480	90	6,060	340	2,650
Fairfield North Texas Street Core	Mixed-Use Corridor	4,550	9,940	1,600	3,370	1,420	2,420
Fairfield West Texas Street Gateway	Mixed-Use Corridor	3,000	10,380	1,020	3,450	1,680	2,890
Suisun City Downtown & Waterfront	Transit Town Center	2,990	6,090	1,090	2,160	1,040	1,960
Vacaville Downtown	Transit Town Center	530	2,260	220	920	2,800	3,800
Vacaville Allison Area	Suburban Center	1,140	1,460	550	690	900	1,710
Vallejo Waterfront & Downtown	Suburban Center	1,970	4,030	980	1,920	3,640	5,940

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Sonoma  
County







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# Sonoma County

Sonoma County is the largest and northernmost of the North Bay counties. The county has urban, suburban and rural areas, including an ocean coastline, redwood forests, wetlands, and small farms. Urban development in Sonoma County is concentrated within cities along the US Highway 101 corridor. This focused growth pattern has been supported by voter-approved urban growth boundaries and other policies that encourage separation between cities and scenic landscapes.

The introduction of Sonoma-Marina Area Rail Transit (SMART) will enhance existing transit service in the county and improve connections between Sonoma's cities, destinations in Marin County, and regional employment centers via ferry access to San Francisco. Stations are planned in Cloverdale, Healdsburg, Windsor, Santa Rosa, Rohnert Park, Cotati, and Petaluma, and are located largely within Priority Development Areas (PDAs) with recently adopted station area plans.

Sonoma County is projected to assume five percent of regional growth between 2010 and 2040, adding about 34,900 new households and 65,400 jobs. The county will focus the majority of future development in its central cities along the SMART corridor, particularly Santa Rosa, the largest jurisdiction in the county.



Sonoma Coast

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## ECONOMY

Known for its wine and scenic vistas, Sonoma County is a premier Bay Area tourist destination. According to the 2012 Tourism Report prepared by the Economic Development Board of Sonoma County, \$1.35 billion were generated in 2010 by destination spending in the county and 16,540 jobs were supported by those dollars. Collectively, the three sectors most related to the wine industry (Agriculture and Natural Resources, Manufacturing and Wholesale, and Arts, Recreation and Other Services) make up 34 percent of all the jobs in Sonoma County.

Between 2010 and 2040, Sonoma is projected to add over 65,000 new jobs. The estimated 34 percent increase is similar to the region as a whole. The fastest growing sectors are expected to be Professional

and Managerial Services (growing by 68 percent), Construction (61 percent increase), Arts, Recreation and Other Services and Health and Educational Services, each of which are projected to grow by 58 percent. These four sectors are expected to add over 80 percent of new jobs.

Overall, new jobs will be concentrated in Santa Rosa, which is expected to take on 44 percent of the county's projected job growth (28,500 jobs), and unincorporated Sonoma County, which will take on 28 percent of the county's growth (13,300 jobs). While Santa Rosa and unincorporated Sonoma County are projected to take on the most absolute growth, Rohnert Park and Cloverdale will experience the most growth relative to existing employment with 39 percent and 44 percent increases respectively.

## POPULATION

The population of Sonoma County is expected to grow by about 114,600 residents between 2010 and 2040, representing a 24 percent increase. The number of households in the county is expected to increase by 19 percent, or 34,900 households. Santa Rosa, Petaluma, and Rohnert Park will continue to have the largest populations, taking on a combined 65 percent of the county's projected population growth. Cloverdale will experience the fastest growth at 34 percent (2,900 new residents).



Windsor



## PRIORITY DEVELOPMENT AREAS

Sonoma County jurisdictions have designated 12 PDAs, mostly around SMART stations and along US Highway 101, with five in Santa Rosa, two in Rohnert Park, and a sizeable one in Petaluma. The cities of Sonoma and Healdsburg do not have a PDA. PDAs are projected to take on 57 percent of their household growth and 45 percent of job growth. This growth pattern will focus future development away from open space areas and toward developed areas, although 20 percent of the county's overall job growth and 19 percent of household growth are projected to occur in unincorporated areas of the county. The southern portion of Sonoma County is projected to take on the largest share of the county's development.

### North County

Cloverdale is planning to channel most of its future development into its Downtown/SMART Transit Area. When complete, this PDA will provide an active, livable downtown where residents, employees and visi-



Santa Rosa Railroad Square Hotel



Santa Rosa Railroad Square

tors can take advantage of rail and bus service.

Windsor's Redevelopment Area PDA is planned as a medium density, transit-oriented, cultural hub. The intermodal rail station will accommodate SMART commuter rail service. About 38 percent of the town's new jobs and 62 percent of new households are projected to locate in the PDA.

## South County

There are PDAs in all cities in the southern portion of Sonoma County (Cotati, Petaluma, Rohnert Park, Santa Rosa, Sebastopol, and Sonoma). These cities are projected to take three-quarters of the county's development in both households and jobs. Most of the population growth in the county will be concentrated in the city of Santa Rosa, which is projected to grow by 32 percent. Within Santa Rosa population growth will concentrate around the downtown, the Santa Rosa Avenue and Sebastopol Road transit corridor PDAs, where transit investment will improve job access. These three PDAs will account for 45% each of the city's household and job growth.

Rohnert Park and Sebastopol are projected to grow by 27 percent and 17 percent, respectively. Rohnert Park has chosen to concentrate the bulk of its growth around its SMART station in the Central Rohnert Park PDA, which is slated to take on 62 percent of the city's job and 78 percent of its household growth. The city of Sebastopol envisions a wide variety of medium-density residential, commercial, and civic uses in a lively downtown district, where improving circulation and facilitating transportation alternatives would support the concepts of sustainable development. Proportionally, Sebastopol will focus most of its growth in its Core Area PDA, with 95 percent of new jobs and 91 percent of new households.



Petaluma



## Sonoma County Projections

	2010	2015	2020	2025	2030	2035	2040
Population	483,878	500,500	517,700	535,900	555,300	576,500	598,500
Household Population	473,835	490,000	506,800	524,300	542,900	563,100	584,100
Households	185,825	191,530	197,430	203,110	209,080	214,830	220,700
Persons Per Household	2.55	2.56	2.57	2.58	2.60	2.62	2.65
Employed Residents	219,160	235,470	253,040	257,060	261,320	268,550	275,960
	2010	2015	2020	2025	2030	2035	2040
Agriculture & Natural Resources	7,160	7,300	7,470	7,210	6,960	6,790	6,590
Construction	9,710	11,550	13,640	14,050	14,470	15,030	15,620
Manufacturing & Wholesale	28,880	29,720	30,550	30,110	29,690	29,530	29,350
Retail	23,130	24,740	26,470	26,670	26,870	27,370	27,870
Transportation & Utilities	4,320	4,370	4,430	4,440	4,450	4,460	4,480
Information	2,770	3,090	3,430	3,460	3,490	3,550	3,610
Financial & Leasing	8,080	8,080	7,980	7,990	7,980	7,980	7,960
Professional & Managerial Services	23,240	26,670	30,620	32,410	34,330	36,650	39,150
Health & Educational Services	26,990	30,080	33,570	35,440	37,450	39,930	42,550
Arts, Recreation & Other Services	28,500	32,510	37,100	38,750	40,480	42,720	45,090
Government	29,230	30,070	30,880	31,710	32,570	33,860	35,200
<b>Total Jobs</b>	<b>192,010</b>	<b>208,180</b>	<b>226,140</b>	<b>232,240</b>	<b>238,740</b>	<b>247,870</b>	<b>257,470</b>

## Total Population

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
CLOVERDALE	8,618	9,100	9,500	10,000	10,500	11,000	11,500
COTATI	7,265	7,500	7,700	8,000	8,200	8,500	8,800
HEALDSBURG	11,267	11,400	11,600	11,900	12,000	12,200	12,300
PETALUMA	57,941	59,200	60,600	62,000	63,600	65,400	67,200
ROHNERT PARK	40,971	42,600	44,300	46,000	47,900	49,900	52,000
SANTA ROSA	167,816	175,800	184,100	192,700	201,800	211,600	221,800
SEBASTOPOL	7,379	7,600	7,700	7,900	8,200	8,400	8,700
SONOMA	10,648	10,800	11,100	11,300	11,500	11,800	12,100
WINDSOR	26,787	27,800	28,800	29,900	31,100	32,300	33,600
UNINCORPORATED	145,186	148,700	152,300	156,200	160,500	165,400	170,500
<b>SONOMA COUNTY</b>	<b>483,878</b>	<b>500,500</b>	<b>517,700</b>	<b>535,900</b>	<b>555,300</b>	<b>576,500</b>	<b>598,500</b>

## Households

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
CLOVERDALE	3,182	3,320	3,470	3,610	3,750	3,900	4,040
COTATI	2,978	3,070	3,160	3,250	3,350	3,440	3,530
HEALDSBURG	4,385	4,410	4,500	4,590	4,610	4,630	4,650
PETALUMA	21,737	22,210	22,690	23,160	23,650	24,130	24,620
ROHNERT PARK	15,808	16,430	17,060	17,670	18,330	18,950	19,600
SANTA ROSA	63,591	66,370	69,230	71,970	74,880	77,690	80,580
SEBASTOPOL	3,276	3,350	3,420	3,490	3,570	3,640	3,710
SONOMA	4,955	5,030	5,110	5,200	5,260	5,320	5,390
WINDSOR	8,962	9,280	9,600	9,900	10,230	10,550	10,880
UNINCORPORATED	56,951	58,060	59,190	60,270	61,450	62,580	63,700
<b>SONOMA COUNTY</b>	<b>185,825</b>	<b>191,530</b>	<b>197,430</b>	<b>203,110</b>	<b>209,080</b>	<b>214,830</b>	<b>220,700</b>

## Total Jobs

	Jurisdictional Boundary						
	2010	2015	2020	2025	2030	2035	2040
CLOVERDALE	1,570	1,740	1,920	2,000	2,070	2,170	2,270
COTATI	2,920	3,180	3,460	3,540	3,610	3,740	3,860
HEALDSBURG	6,440	6,890	7,390	7,540	7,720	7,960	8,210
PETALUMA	28,830	31,300	34,040	34,930	35,920	37,270	38,690
ROHNERT PARK	11,730	12,850	14,100	14,550	15,000	15,640	16,320
SANTA ROSA	75,460	82,130	89,480	92,360	95,410	99,560	103,940
SEBASTOPOL	5,650	6,040	6,500	6,650	6,820	7,060	7,300
SONOMA	6,650	7,130	7,660	7,860	8,070	8,350	8,650
WINDSOR	5,610	6,160	6,790	6,980	7,180	7,470	7,760
UNINCORPORATED	47,150	50,760	54,800	55,830	56,940	58,650	60,470
<b>SONOMA COUNTY</b>	<b>192,010</b>	<b>208,180</b>	<b>226,140</b>	<b>232,240</b>	<b>238,740</b>	<b>247,870</b>	<b>257,470</b>

Sonoma County Priority Development Areas	Place Type	Population		Households		Jobs	
		2010	2040	2010	2040	2010	2040
Cloverdale Downtown/SMART Transit Area	Transit Town Center	3,100	5,530	1,040	1,800	880	1,390
Cotati Downtown and Cotati Depot	Transit Town Center	1,890	2,920	830	1,250	650	1,190
Petaluma Central, Turning Basin/Lower Reach	Suburban Center	1,800	6,030	750	2,500	3,110	8,330
Rohnert Park Sonoma Mountain Village	Suburban Center	530	6,180	200	2,170	140	1,190
Rohnert Park Central Rohnert Park	Transit Town Center	2,370	4,280	1,300	2,270	3,350	5,170
Sebastopol Core Area	Transit Town Center	5,160	6,280	2,360	2,750	5,440	7,010
Santa Rosa Downtown Station Area *	City Center	5,270	14,450	2,080	5,980	9,250	13,800
Santa Rosa Mendocino Avenue/Santa Rosa Avenue Corridor *	Mixed-Use Corridor	15,250	21,020	5,850	7,460	23,230	30,090
Santa Rosa Sebastopol Road Corridor *	Mixed-Use Corridor	7,800	15,010	2,400	4,480	2,110	3,450
Santa Rosa North Santa Rosa Station	Suburban Center	10,720	16,900	3,960	6,040	8,960	13,060
Santa Rosa Roseland	Transit Neighborhood	12,720	24,310	3,400	6,300	2,650	3,890
Windsor Redevelopment Area	Suburban Center	4,190	8,100	1,370	2,550	1,020	1,830

\* Indicates PDAs that overlap within a jurisdiction. Job totals for the overlapping areas are assigned to one PDA only, with no duplicate counts.

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# Projections and Priorities 2013

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