

A Regional Growth Forecast



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2026 Regional Growth Forecast Technical Documentation

Association of Monterey Bay Area Governments

Schedule for Adoption in June 2026

Executive Summary

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

The last RGF was adopted in 2022. AMBAG staff began the process of developing a new forecast in summer 2023. This new forecast is referred to as the 2026 RGF.

In preparation for this forecast, AMBAG staff conducted a review of recently completed population, housing and employment forecasts. The results of this review indicated that MPOs in California are increasingly using a cohort-component methodology that considers three key factors in population change: births, deaths and migration. After assessing various forecast methodology alternatives, in fall 2023, AMBAG made the choice to move to an integrated cohort-component, jobs, and housing modeling framework. To disaggregate the forecast for each jurisdiction, AMBAG and Population Reference Bureau (PRB) used the most current data available to update a series of shift-share models similar to the methodology used in the 2022 RGF. Refer to Attachment 3 for more information.

This technical document provides a description of the methodology for the development of the RGF figures in addition to the methodology for disaggregation of those figures. The regional and subregional forecast figures for population, jobs, and housing were accepted by the AMBAG Board of Directors at its October 9, 2024 meeting.

What is the Regional Growth Forecast?

The purpose of the RGF is to show likely changes in population, housing, and jobs in the region and its jurisdictions between 2020 and 2050, based on the most current information and accurate data available. As growth patterns change over time, the forecast is updated every four years to reflect the latest data.

Results from the forecast are used as inputs in the RTDM to predict and plan for future travel patterns. The RGF and RTDM are used together to inform regional and local planning projects such as the

Metropolitan Transportation Plan and Sustainable Communities Strategy (MTP/SCS), transportation projects, and corridor studies.

What Trends Inform the Forecast?

Locally, statewide, nationally, and even globally, population growth is slowing. Birth rates have fallen rapidly, net migration has fallen, and life expectancy improvements stalled even before the COVID-19 pandemic began. As a result of these forces, population growth in the future is expected to be slower than in the past.

In addition, the region's population is expected to age considerably in the coming decades. The child population has begun to shrink, and that trend will continue throughout the forecast. Meanwhile, the older adult population (ages 65 and older) will grow rapidly. Given that older adults are more likely to live alone than younger adults (and children typically do not live alone), housing an aging population requires more housing per capita. In addition, policies to support additional housing production are starting to increase supply and ease existing unmet housing demand. This forecast anticipates a period of housing production that brings vacancy rates back to their historic average. As a result of demographic and housing trends, the rate of housing growth in this forecast is faster than the rate of population growth.

The region has seen robust job growth in recent years, even as population growth dipped. Part of the mismatch in trend reflects a rebound from pandemic-related shifts. Population and jobs are anticipated to grow at more similar rates in the future.

How is the Forecast Different From Other Planning Efforts?

The forecast is an expectation of growth based on historical trends, current conditions, and development pipeline information shared by jurisdictions. It is informed by, but is not the same as, General Plans nor the Regional Housing Needs Allocation (RHNA). A city's or county's General Plan reflects a "what if" scenario that assumes all development is built out by a set horizon date. RHNA is an assessment of, and plan for, addressing eight years of housing need (including existing unmet need). The forecast reflects reasonably anticipated growth given demographic and economic trends—locally, nationally, and globally. The RGF takes plans and housing elements into consideration but does not assume "buildout" of either by a set date. The forecast assumes housing elements are updated to reflect 6th Cycle RHNA housing, and by the plan horizon the region is anticipated to have at least enough units to accommodate the 6th Cycle housing determination.

Summary of the Forecast

The 2026 RGF projects that the region's population will grow by approximately 39,600 people (5% increase) between 2020 and 2050, for a total population of just over 813,700 in 2050. This is considerably lower than prior forecasts and follows the slowing growth rates seen at both the state and national level. This revised growth trend also reflects the most current population estimate for the region. As a result of declining fertility, stalled improvements in life expectancy, falling international migration, and the COVID-19 pandemic, the 2023 population estimate was more than 26,500 people lower than prior forecasts predicted. In addition to slower growth, the new forecast predicts an older age distribution, with a larger proportion of the population age 65 and older.

An aging population affects the household and housing unit forecasts. While population growth will slow, which reduces future housing demand, older people are more likely to live alone or in small households. This shift offsets the lower population forecast with a slight upward effect on housing demand and reflects the latest data, which showed nearly 2,600 more houses in 2023 than anticipated in prior forecasts. The net result is that the region is expected to add just over 46,600 housing units (17% increase) by 2050, for a total of just under 317,000 units.

The 2026 RGF projects that the region will add approximately 54,300 jobs (15% increase) between 2020 and 2050, for a total of just over 426,300 jobs by 2050. The regional growth rate is slightly slower than nation- and state-level forecasts, reflecting historical growth rates that have tended to be slightly slower than either the state or nation. Furthermore, job growth is expected across most employment sectors. The fastest-growing industries include Other Services and Health Care and Social Assistance. Conversely, Retail is expected to contract slightly. Notably, while some models for the U.S. predict declines in Agricultural job growth, the AMBAG region is experiencing steady Agricultural job growth.

Section 1: Process for Forecast Completion

The forecasting framework begins with a regional forecast for the AMBAG region as a whole and then allocates growth to jurisdictions in a subregional allocation model. The forecast is informed by local expertise at several key points in the process and is underpinned by the latest, highest-quality data. Each step is described in detail below.

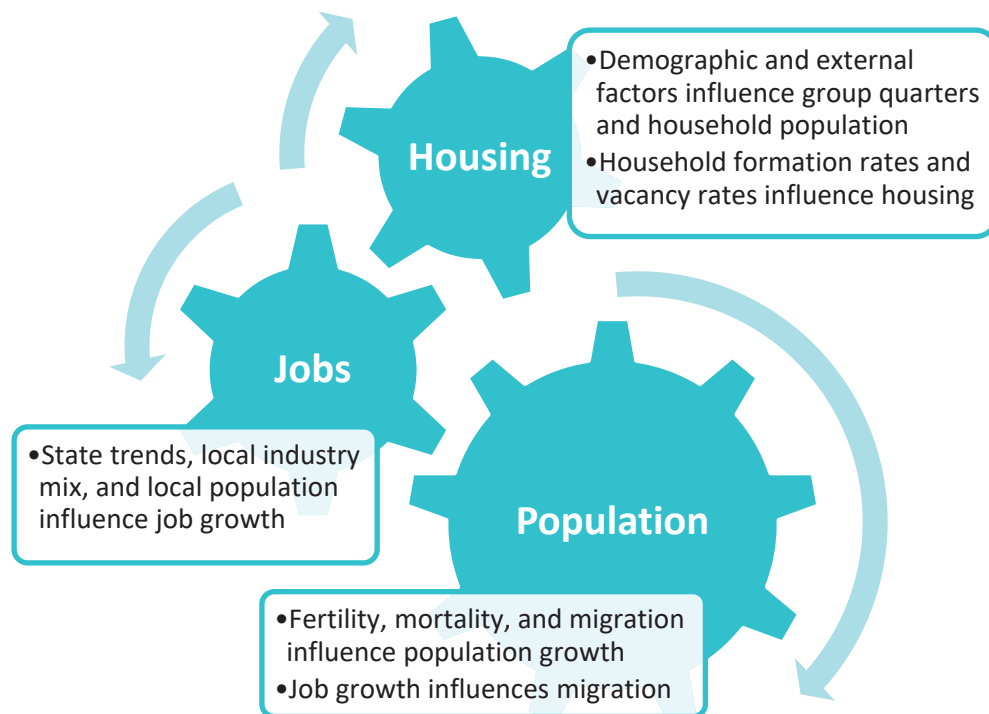
In summer 2023, AMBAG asked PRB to prepare regional employment, population, and housing projections up to 2050. This section documents the findings of the work by PRB and includes a summary of the methodology, a description of the projections, and an explanation of past, current, and projected growth in the region.

Regional Growth Forecast Methodology

The forecasting framework is an integrated model. Population projections rely on a cohort-component model in which birth, death, and migration data inform future population. The framework uses a shift-share model for employment (also referred to as “jobs”) by industry that links regional growth to state trends, with links to population growth. Housing growth reflects household formation and vacancy rates. The modeling framework is illustrated in Figure 1 below.

The model components are linked. For example, job growth influences migration in the population model. Population influences selected industry sectors (such as retail and self-employment) in the employment model. Population growth affects household formation in the housing model.

Figure 1: Framework for Regional Forecast



Population: Fertility, mortality, and migration trends influence population growth. Employment forecast influences migration levels.

Household Population and Households: Demographic factors (e.g., age, sex, race/ethnicity) and external factors (e.g., major group quarters facilities like colleges and universities, correctional facilities, etc.) influence the household population and household formation rates (i.e., the number of people per household).

Housing Units: Housing projections are driven by the household population projection, demographic characteristics of the household population (age, sex, race/ethnicity), household formation rates, and housing vacancy rates.

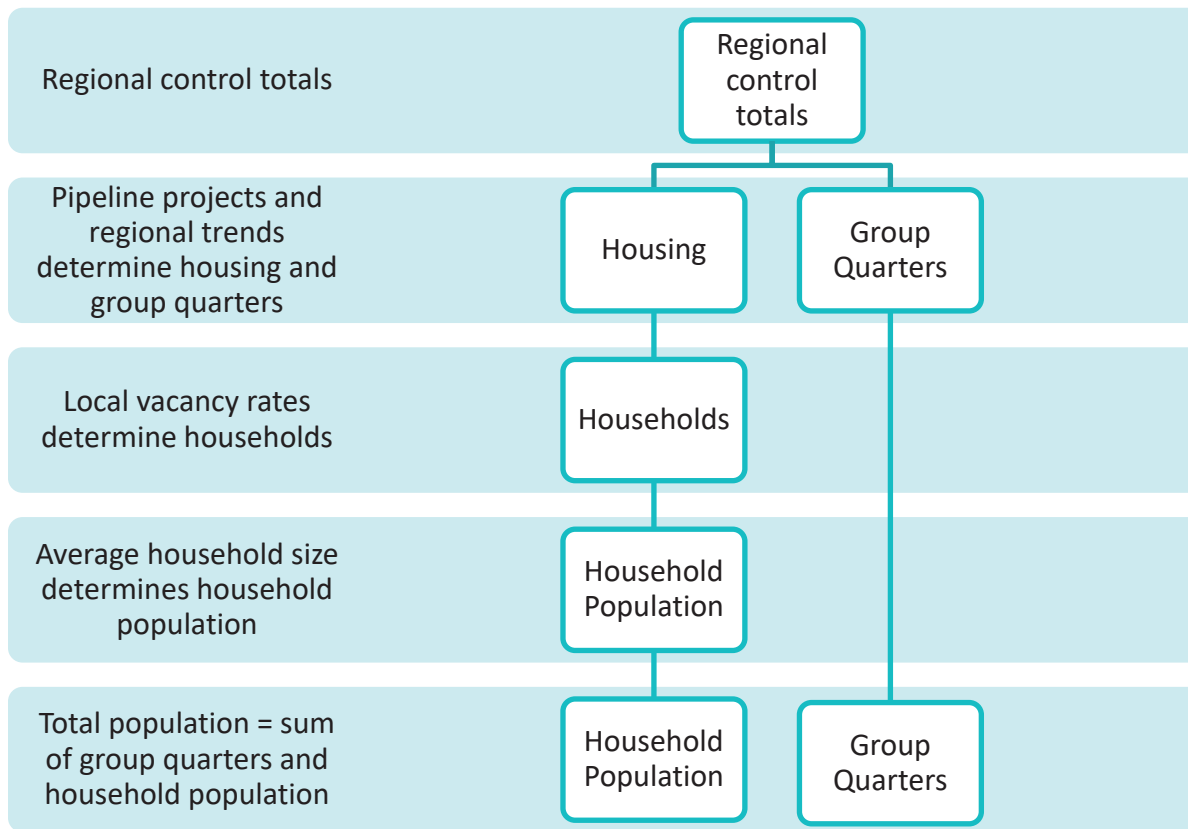
Employment: Employment growth by industry is driven by projected statewide trends for major industry sectors in the region using a shift-share model. Results are compared to labor force projections (determined by the working-age population) and constrained by the size of the labor force if needed. Selected industries (retail, other services, self-employed) are directly linked to the total population.

Data sources for the regional forecast include the U.S. Census Bureau (decennial census, American Community Survey), National Center for Health Statistics, California Department of Finance (DOF), California Employment Development Department (EDD), California Department of Public Health, California Department of Education, and others.

The regional forecast provides control totals that guide the subregional allocation.

Subregional Allocation Methodology

Following the preparation of the regional forecast figures, AMBAG staff and PRB began the process of disaggregating the figures to each of the jurisdictions using historical data, along with local information (such as projects under construction or entitled), to develop a baseline disaggregated forecast. The methodology incorporates the steps described in Figures 2 and 3 below.

Figure 2: Framework for Subregional Allocation of Housing and Population

Housing Units: Pipeline projects and regional trends influence each jurisdiction’s housing unit forecast. Housing units may be occupied or vacant.

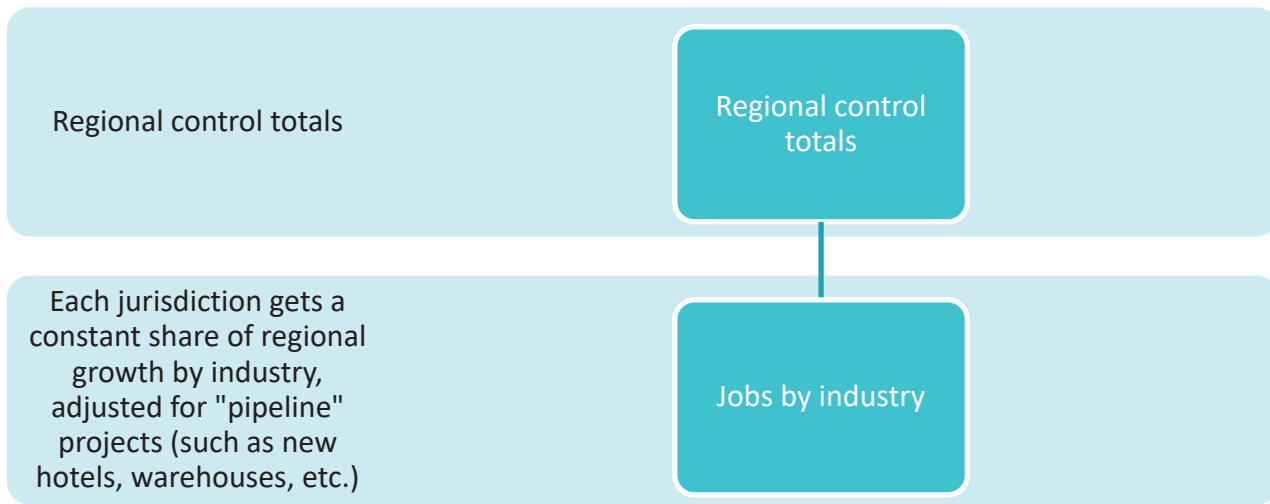
Households: Vacancy rates and regional trends in vacancy influence each jurisdiction’s household (occupied housing unit) forecast.

Vacancy Rate: The vacancy rate is the number of vacant units divided by the total number of housing units. Vacant units include those for sale, for rent, for seasonal/recreational use, or for non-residential use (such as an accessory dwelling unit that is being used as a home office), as well as units that are for short-term rent.

Household Population: Average household size and regional trends in household size influence each jurisdiction’s household population forecast.

Group Quarters: Pipeline projects and regional trends influence each jurisdiction’s group quarters forecast. In accordance with definitions used by the U.S. Census Bureau and DOF, group quarters are counted in the population numbers, not in the housing stock.

Population: The population forecast for each jurisdiction is the sum of its household population and group quarters populations.

Figure 3: Framework for Subregional Allocation of Employment by Industry

Employment: For each jurisdiction (cities and unincorporated balance of each county), employment growth by industry is a constant share of the region's growth in that industry with adjustments for any known projects in the development pipeline.

Data sources for the subregional forecast include the U.S. Census Bureau, DOF, AMBAG, California Employment Development Department, and others.

In addition to jurisdiction-level forecasts produced based on the modeling framework described above, AMBAG and PRB compiled historical data to track trends, and relied upon institutional/facility plans to produce the population forecast for the following unique areas within jurisdictions:

- Marina:
 - Fort Ord (portion)
 - California State University, Monterey Bay (CSUMB) (portion)
- Monterey
 - Presidio and Naval Support Activity Monterey (including the Naval Postgraduate School)
- Seaside
 - Fort Ord (portion)
 - CSUMB (portion)
- Soledad
 - Salinas Valley State Prison (SVSP) & Correctional Training Facility (CTF)
- Balance of County
 - CSUMB (portion)
- Santa Cruz
 - University of California, Santa Cruz (UCSC)

Sources include DOF, U.S. Census Bureau, and institutional records.

This process resulted in a draft forecast at the jurisdictional level that was used for discussion with staff at each of the cities and counties within the region. In addition to the cities and counties, AMBAG staff met with the Local Agency Formation Commissions (LAFCOs), UCSC, and CSUMB to discuss the results. Adjustments were made to the forecast based on these conversations such as incorporating growth on the basis of planned developments, specific and general plan updates, and economic development plans. The process of revision and meeting with local jurisdictions one-on-one was repeated several times to reach a consensus on the forecast.

As described above, local jurisdictions had an opportunity for providing input into the forecast model (projects in the “development pipeline” such as under construction or entitled), and opportunities for review and comment on drafts of the forecast. Although the forecast took local input into account, the forecast was not constrained by existing General Plans.

Forecast Timeline and Local Input

AMBAG began the RGF update process in summer 2023. A list of key milestones is shown below:

- July 21, 2023 – The Planning Directors began reviewing three methodology options for producing the RGF.
- August 9, 2023 – AMBAG and PRB presented forecast methodology options to the AMBAG Board of Directors.
- August 28, 2023 – The Planning Directors recommended the cohort-component methodology for the RGF.
- September 8, 2023 – AMBAG and PRB convened a workgroup to review forecast assumptions.
- September 13, 2023 – The AMBAG Board approved the cohort-component methodology for the RGF.
- September 25, 2023 – AMBAG staff presented RGF assumptions and a preliminary draft forecast to the Planning Directors Forum.
- October 11, 2023 – AMBAG staff presented a preliminary draft RGF to the AMBAG Board.
- October 23, 2023 – AMBAG staff presented a draft RGF to the Planning Directors Forum.
- November 8, 2023 – AMBAG staff presented a revised draft RGF, along with high/low forecast scenario analysis, to the AMBAG Board.
- November 27, 2023 – AMBAG staff presented a revised draft RGF, along with high/low forecast scenario analysis, to the Planning Directors Forum. The Planning Directors provided suggestions for additional revisions to the draft.
- January 10, 2024 – AMBAG staff presented the final draft RGF to the AMBAG Board.
- February - March 2024 – AMBAG staff conducted one-on-one meetings with each jurisdiction to begin the subregional allocation. These meetings uncovered several discrepancies in the 2020 Census data (described in the section Data Discrepancies and Challenges With 2020 Census Data) and led to a technical update to the RGF.
- May 8, 2024 – AMBAG staff presented the updated RGF and preliminary draft subregional allocation to the AMBAG Board.

- May 2024 –DOF released revised population estimates for 2021-2023, and preliminary estimates for January 1, 2024.¹
- May - June 2024 – AMBAG staff conducted additional one-on-one meetings with jurisdictions to verify forecast input data.
- August 14, 2024 – AMBAG staff presented the updated RGF and draft subregional allocation to the AMBAG Board.
- October 9, 2024 – The AMBAG Board accepted the RGF for planning purposes.

Data Discrepancies and Challenges With 2020 Census Data

The RGF relies on the most current and accurate data available, which typically includes decennial census data. However, the 2020 Census was beset by historic challenges including a global pandemic, social unrest, and climactic disruptions such as wildfires and hurricanes. The U.S. Census Bureau is to be commended for carrying out the largest peacetime mobilization effort anywhere in the world under such unprecedented circumstances. Given the conditions in 2020, the quality of the 2020 Census is remarkable. For example, based on the Post-Enumeration Survey, California’s overcount was estimated to be just 0.47%—not statistically different from zero.²

However, despite herculean efforts and reasonable quality for total population counts at the state and national levels, 2020 Census data products have several known data issues that are particularly relevant for sub-state and subgroup analysis. These issues include:

- Differential undercounts,
- Widespread errors in group quarters enumeration,
- Age structure errors (known as “age heaping”), and
- Inconsistencies, such as statistical noise and bias, introduced by new disclosure avoidance measures.

The remainder of this section focuses on issues specific to the AMBAG region and relevant to the 2026 RGF. For a comprehensive analysis of data quality issues in the 2020 Census, refer to [Assessing the 2020 Census: Final Report](#), from the Committee on National Statistics Panel to Evaluate the Quality of the 2020 Census.³

¹ Although data are presented with a 2023 launch—the most current year of employment data available—AMBAG and PRB were able to calibrate the population and housing forecast data for 2024 to the estimates released by the California Department of Finance in 2024.

² U.S. Census Bureau. “2020 Census Undercounts in Six States, Overcounts in Eight.” <https://www.census.gov/library/stories/2022/05/2020-census-undercount-overcount-rates-by-state.html>

³ National Academies of Sciences, Engineering, and Medicine. 2023. *Assessing the 2020 Census: Final Report*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/27150>

Group Quarters Data Quality Concerns

The COVID-19 pandemic resulted in delays, fielding changes, and access restrictions that were particularly challenging for conducting an accurate group quarters (GQ) enumeration.⁴ For example, the count of people experiencing homelessness happened several months later than planned and many service locations—where people might otherwise have been counted—were closed due to pandemic protection measures.⁵ Pandemic disruptions were especially noticeable in the count of college students—including both on-campus GQ and off-campus (household population).⁶ The count was also disrupted for other group quarters types. For example, COVID-19 mitigation strategies led to access restrictions to nursing and healthcare facilities.

The 2020 Census count of group quarters was so challenging—and the results so different than high-quality, locally developed inventories—that California Department of Finance (DOF) edited city-level group quarters. The updated group quarters data also resulted in revised total population counts for many jurisdictions.⁷ In general, these revisions resulted in higher-quality local data for jurisdictions in the region.

One of these revisions resulted in reporting 49 group quarters population in Sand City. However, Sand City staff noted that there are zero group quarters in their city. At the request of Sand City staff, AMBAG staff investigated the discrepancy and confirmed that zero group quarters were counted in Sand City in the 2020 Census. AMBAG revised Sand City’s base year population data to reflect zero group quarters population.

Farmworker Housing

In addition to data collection challenges, farmworker housing also was subject to definitional challenges. Farmworker housing functions like—and should be counted as—group quarters. However, because modern farmworker housing often looks like a house or apartment, it may inadvertently be counted as a housing unit.⁸ 2020 Census counts appear to have either missed, or misclassified, some farmworker housing in the region. For example, during consultations, the County of San Benito

⁴ Linda Jacobsen. (2023). “How Accurate Was the 2020 Census—And Why Should You Care?” <https://www.prb.org/resources/how-accurate-was-the-2020-census-and-why-should-you-care/> National Academies of Sciences, Engineering, and Medicine. 2023. *Assessing the 2020 Census: Final Report*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/27150>

⁵ Lilian Kilduff and Beth Jarosz. (2020). “Disasters Raise Risk of a Homeless Undercount in 2020 Census.” <https://www.prb.org/resources/disasters-raise-risk-of-a-homeless-undercount-in-2020-census/>

⁶ National Academies of Sciences, Engineering, and Medicine. 2023. *Assessing the 2020 Census: Final Report*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/27150>

⁷ Email correspondence between California Department of Finance, AMBAG, and PRB on June 13, 2024.

⁸ This misclassification is particularly challenging given that with a 2 bedroom / 8 person structure type, farmworker housing gets categorized as *overcrowded housing* if it is miscounted as household rather than group quarters.

described considerable increases in farmworker housing between 2010 and 2020 that did not appear to be reflected in 2020 Census group quarters data.

In addition, both Greenfield and King City added farmworker housing between 2020 and 2023. These new group quarter counts were not reflected in estimates from DOF. Unfortunately, there was not an outside source (like the 2020 Census) that could be used to confirm a revision to 2021-2023 historical data. However, the completed farmworker housing, and its associated group quarters population, are captured in AMBAG's forecast year counts for Greenfield and King City.

Housing Discrepancy Discovered During Local Review

During jurisdiction review Carmel-by-the-Sea identified a concern with their housing unit count. A comparison of 2020 Census and 2010 Census data for the city showed a decline in the number of housing units, from 3,417 in the 2010 Census to just 3,056 in the 2020 Census. This change was not supported by any unit loss in the city over the decade.

Investigations by DOF, which wrapped up in November 2024, attributed the discrepancy to Carmel's 2020 Census count. DOF's analysis suggested that the 2020 Census count should have included 381 additional housing units, for a new 2020 total of 3,437 units. As a result of their investigation, DOF will revise estimates beginning with their May 2025 release.⁹ Unfortunately, the revised data were not available in time for the 2026 RGF.

Historical Undercounts

Although the 2020 Census was unique in the level of difficulty in counting the U.S. population, historically there are many groups for which the census count is too low (undercount) or too high (overcount).

To gauge the accuracy of the census, the U.S. Census Bureau produces independent estimates of the size and characteristics of the U.S. population using two methods—Demographic Analysis and the Post-Enumeration Survey—and compares those estimates to the enumerated count. Demographic Analysis (DA) estimates the population at the national level only using historical population data, birth and death records, Medicare enrollment records, and estimates of international migration. The Post-Enumeration Survey (PES) estimates the population at both the state and national levels using a sample survey independent of the census and conducted after its conclusion.¹⁰

⁹ Email correspondence between California Department of Finance, AMBAG, and PRB on November 20, 2024.

¹⁰ Refer to PRB's article "How Will We Measure the Accuracy of the 2020 Census?" for a more detailed description of both Demographic Analysis and the Post-Enumeration Survey, available at: <https://www.prb.org/resources/how-will-we-measure-the-accuracy-of-the-2020-census/>

While the total population count in the 2020 Census was estimated to be highly accurate, there are dramatic differences in the accuracy of the count for some groups, as noted by the Census Bureau in their March 2022 press release.¹¹

Groups with a persistent, significant undercount include young children (especially those ages 0-4), renters, American Indian and Alaska Native people living on tribal reservations, people identifying as Black, people identifying as Latino, and men ages 18-29 and 30-49.¹² Conversely, the 2020 Census overcounted the Non-Hispanic White population and the Asian population.

Undercounts persist, in part, because some groups are harder to count than others. The Census Bureau provides examples of people who may fall into one or more categories of "hard-to-count" populations, including (but not limited to):

- Young children.
- Racial and ethnic minorities.
- People who speak languages other than English.
- Low-income populations.
- Undocumented immigrants.
- People who are lesbian, gay, bisexual, transgender, and questioning/queer.
- People with disabilities.
- People who do not live in traditional housing.¹³

During preparation of the 2026 RGF, conversations with experts from across the region suggested that farmworkers may have been undercounted in the 2020 Census. Although there are no estimates of undercount of the farmworker population, farmworkers often speak a language other than English, often work for low wages, sometimes lack immigration documentation, and may not live in traditional housing. Because so many characteristics of farmworkers align with populations known to be undercounted, it is likely that at least some of these residents were missed in the 2020 Census count for the AMBAG region.

¹¹ U.S. Census Bureau. "Census Bureau Releases Estimates of Undercount and Overcount in the 2020 Census." <https://www.census.gov/newsroom/press-releases/2022/2020-census-estimates-of-undercount-and-overcount.html>

¹² Linda Jacobsen. (2023). "How Accurate Was the 2020 Census—And Why Should You Care?" <https://www.prb.org/resources/how-accurate-was-the-2020-census-and-why-should-you-care/>

U.S. Census Bureau. (2023). "Counting Every Voice: Understanding Hard-to-Count and Historically Undercounted Populations." <https://www.census.gov/newsroom/blogs/random-samplings/2023/10/understanding-undercounted-populations.html#:~:text=We've%20identified%20these%20groups,the%202020%20Census%20Operational%20Plan.>

¹³ U.S. Census Bureau. (2023). "Counting Every Voice: Understanding Hard-to-Count and Historically Undercounted Populations." <https://www.census.gov/newsroom/blogs/random-samplings/2023/10/understanding-undercounted-populations.html#:~:text=We've%20identified%20these%20groups,the%202020%20Census%20Operational%20Plan.>

Section 2: Regional Growth Forecast

This section documents the findings of the work by PRB and includes a summary of the methodology, a description of the projections, and an explanation of past, current, and projected job growth in the region.

Summary of the 2026 Regional Growth Forecast

The 2026 RGF projects that the region's population will grow by approximately 39,600 people (5% increase) between 2020 and 2050, for a total population of just over 813,700 in 2050. This is considerably lower than prior forecasts and follows the slowing growth rates seen at both the state and national level. This revised growth trend also reflects the most current population estimate for the region. As a result of declining fertility, stalled improvements in life expectancy, falling international migration, and the COVID-19 pandemic, the 2023 population estimate was more than 26,500 lower than prior forecasts predicted. In addition to slower growth, the new forecast predicts an older age distribution, with a larger proportion of the population age 65 and older.

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Table 1: Forecast Summary

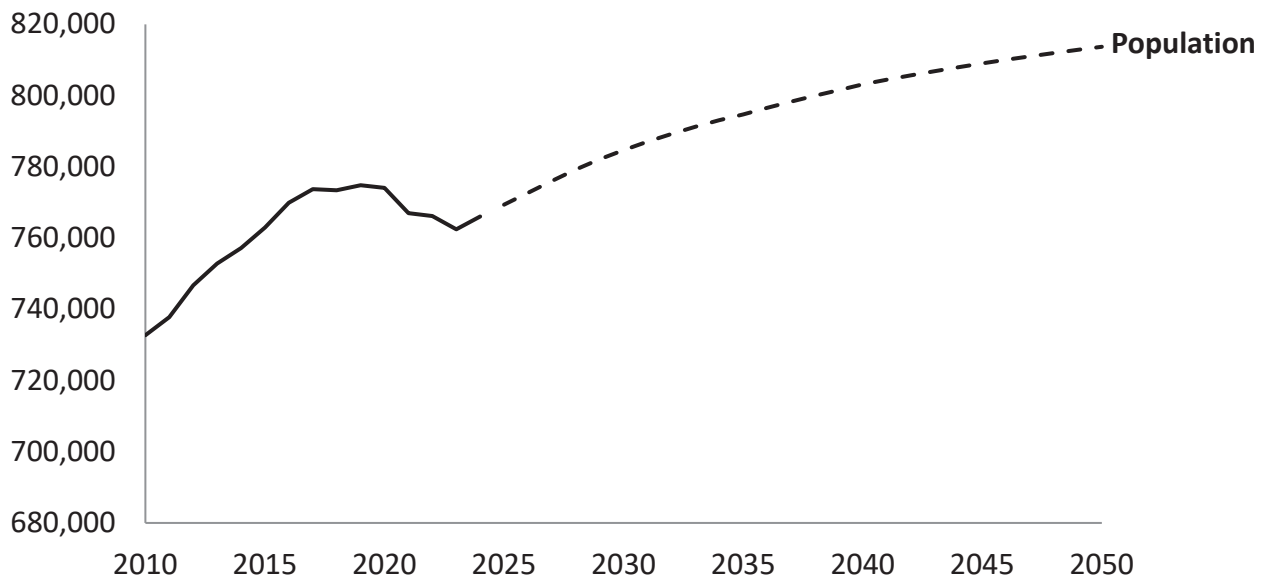
	2010	2015	2020	2023	2030	2035	2040	2045	2050
Population	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708
Change		30,225	11,172	-11,649	22,228	10,036	8,416	5,891	4,681
% Change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%
Housing	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990
Change		3,534	6,551	4,365	18,683	9,649	6,784	4,262	2,906
% Change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%
Households	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569
Change		4,208	7,267	4,450	13,274	7,722	6,121	3,829	2,639
% Change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%
Jobs	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335
Change		25,500	-2,805	28,829	13,620	3,215	3,308	2,806	2,527
% Change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%

Sources: Population, household, and housing data for the years 2010-2023 are from the U.S. Census Bureau and DOF. Jobs data for 2010-2023 are from AMBAG employment inventory. Forecast years were prepared by AMBAG and PRB.

Each major forecast component is described in more detail below.

Population

This forecast projects that the region's population will grow by approximately 39,600 people (5% increase) between 2020 and 2050, for a total population of just over 813,700 in 2050. This is considerably lower than prior forecasts and follows the slowing growth rates seen at both the state and national levels. (Figure 4). This population forecast is substantially lower than the forecast used in the 2022 MTP/SCS, reflecting updated information from the 2020 Census, new estimates from DOF, and the latest vital statistics data. These data sources show a slowing in population growth, steadily falling birth rates, stagnant mortality rates, and an aging population.

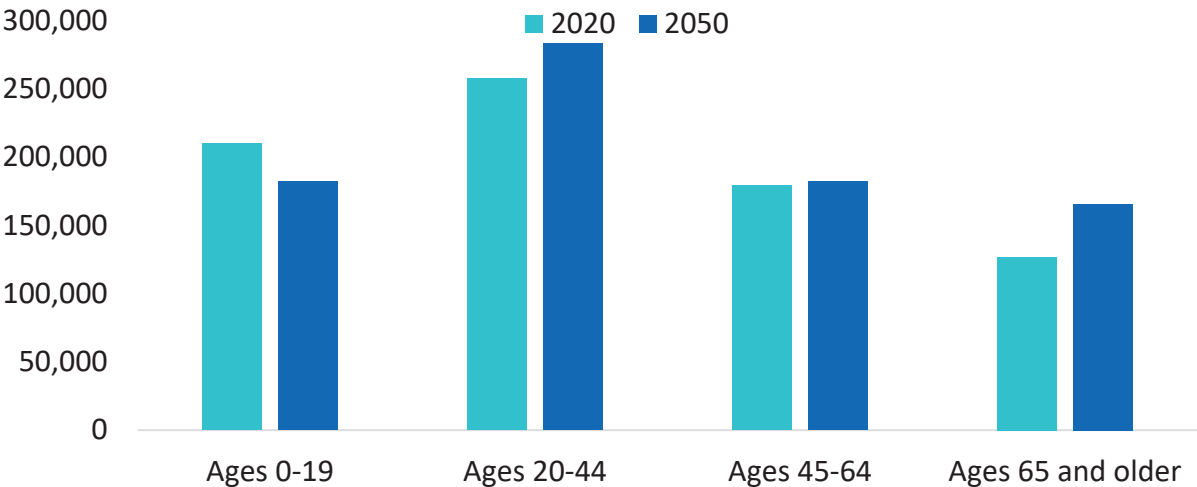
Figure 4: Population Forecast for the AMBAG Region*Population 2010 (Actual, solid line) Through 2050 (Forecast, dashed line)*

Sources: Data for years 2010-2023 from DOF. Forecast years were prepared by AMBAG and PRB.

In this forecast the child and youth population (ages 0-19) is expected to contract by 13% (Figure 5), continuing a trend that began more than a decade ago. The population ages 20-44 is expected to grow by 10%, the population ages 45-64 is expected to grow by 2%, and the older adult population (ages 65 and older) is expected to grow by 31%. Figure 5 illustrates changes by broad age group and Figure 6 illustrates changes by detailed age group for men and women.

Figure 5: AMBAG Region Youth Population Is Expected to Decrease, Adult Population Will Grow

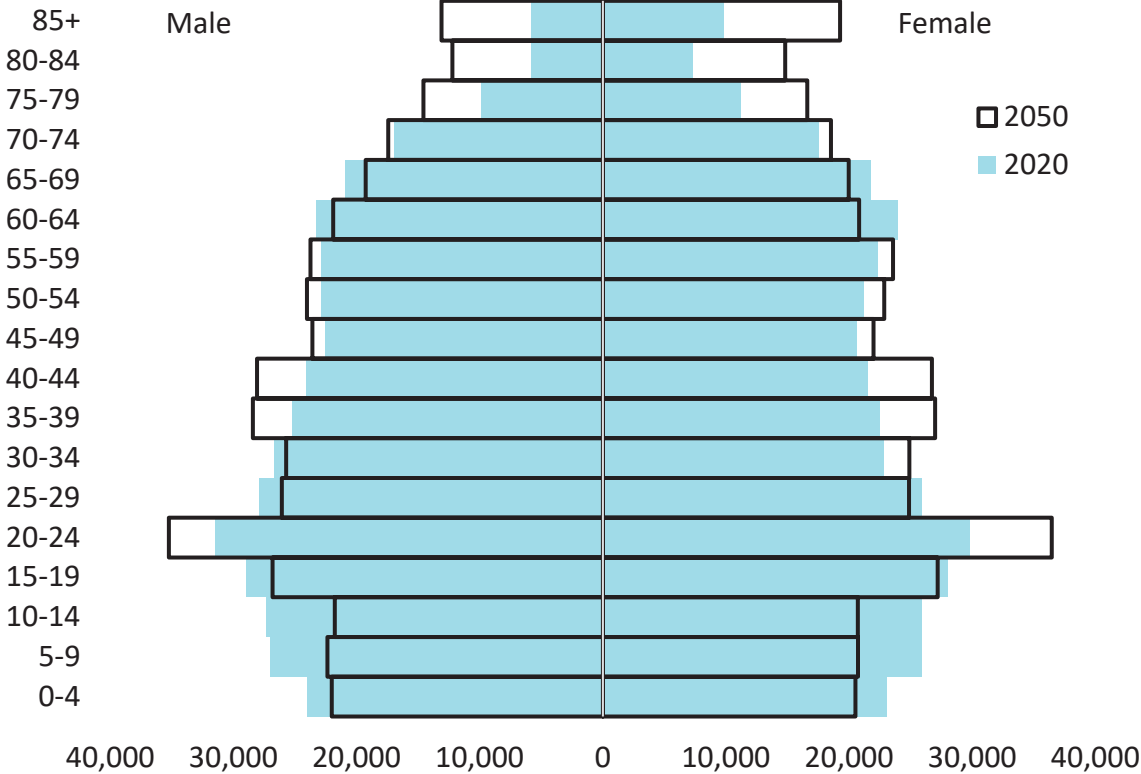
AMBAG Region Population, by Age, 2020 (actual) and 2050 (projected)



Sources: Data for 2020 from DOF. Forecast years were prepared by AMBAG and PRB.

Figure 6: Projected Population Growth Is Concentrated at Ages 30 and Older

AMBAG Region Population, by Age, 2020 (actual) and 2050 (projected)



Sources: Data for 2020 from DOF. Forecast years were prepared by AMBAG and PRB.

The region is projected to grow by approximately 1,300 population per year between 2020 and 2050. This is less than the average of just under 8,900 between 1990 and 2000, the recession-affected growth of 2,200 annually between 2000 and 2010, and the faster growth from 2010 to 2020 of approximately 4,100 per year. But it is considerably faster than growth since 2020. Population fell sharply from 2020 to 2023, falling to just under 762,500 in 2023. The average change from 2020 to 2023 was -3,900 per year.

U.S. and California Population Trends

Locally, statewide, nationally, and even globally, population growth is slowing. Birth rates have fallen rapidly, net migration has fallen, and life expectancy improvements stalled even before the COVID-19 pandemic began. As a result of these forces, population growth in the future is expected to be slower than in the past.

At the national level, the U.S. Census Bureau's latest population projections indicate slow population growth. In the Census' main projection series, the growth rate is only 0.5% and gradually falls a tenth of a percent every decade until the 2080s when it drops below zero.¹⁴ Scenarios with zero and low migration have a negative growth rate starting much sooner, in 2025 and 2044, respectively. The high immigration scenario is the only situation where the U.S. maintains a positive growth rate.

After decades of growth, California lost population between 2020 and 2023. Projections from DOF suggest that the state will have positive but slowing population growth through 2050, and that the population may begin shrinking again in the mid-2050s.¹⁵

Nationally, statewide, and locally, the population is also aging. Between 2010 and 2020 most population growth was at ages 65 and older. Notably, the number of children has begun to fall—a pattern that holds at the national, state, and regional levels (including at the county-level for all three counties in the region).¹⁶

AMBAG Region Population Trends

The AMBAG region has an above-average share of residents who live in group quarters and the numbers of those residents are not tied to typical demographic forces. This trend has continued since 1990 although the mix of group quarters residents has changed (Figures 7 and 8). Changes in group

¹⁴ U.S. Census Bureau. (2023). "2023 National Population Projections." <https://www.census.gov/programs-surveys/popproj.html>

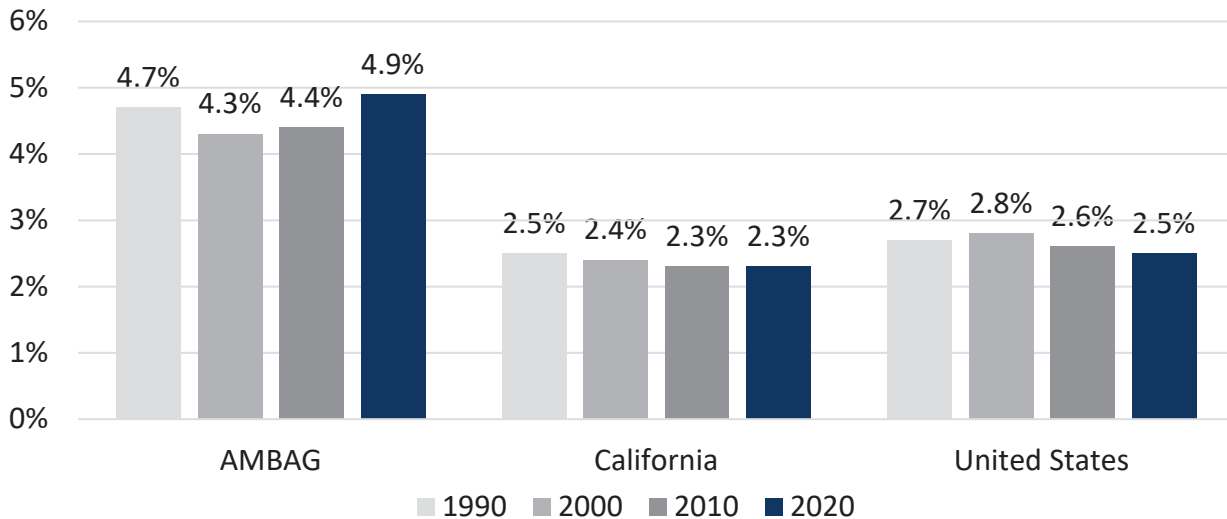
¹⁵ California Department of Finance. (2024). "P-1: State Population Projections (2020-2070)." <https://dof.ca.gov/forecasting/demographics/projections/>

¹⁶ KidsData. (2024). "Child Population, by County." <https://www.kidsdata.org/topic/32/child-population/table#fmt=139&loc=320,355,370,2,1&tf=141,110,124,108,95,46&sortType=asc>

quarters population, such as growth at the region's universities, will play a role in regional growth through 2050.

Figure 7: Group Quarters Account for a Larger Share of Total Population in the AMBAG Region than in the State or Nation

Group Quarters as a Share of Total Population, 1990-2020



Sources: U.S. Census Bureau, DOF

Although there were challenges with collecting an accurate count of college students in the 2020 Census, there has been a clear trend over time. The region's college group quarters population has been increasing (primarily at UCSC and CSUMB) as universities have grown and have added student housing (Figure 8).

Between 2010 and 2020 the population living in prisons in the region fell sharply. This trend reflects a combination of factors that include, but are not limited to, changes in crime rates, changes in sentencing, and changes to address prison overcrowding. Projections from the California Department of Corrections suggest that prison populations are likely to continue falling.¹⁷

In 1990 there was a substantial military group quarters presence around the Fort Ord base. When the base closed, the military population declined. However, there is still a strong military and naval presence in Monterey County including the Presidio area, as well as Fort Hunter Liggett and Camp

¹⁷ California Department of Corrections and Rehabilitation. (2024). "Spring 2024 Population Projections." <https://www.cdcr.ca.gov/research/population-reports-2/>

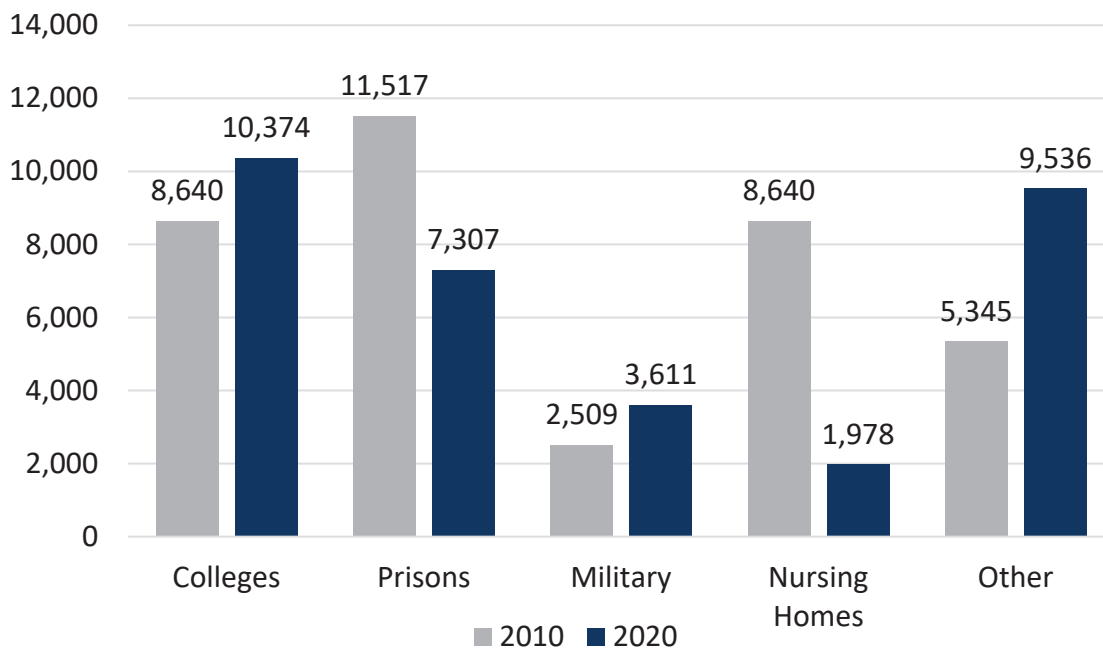
Roberts in the southern portion of the county.¹⁸ In future years it will be important to continue watching the development and growth of military institutions in the region.

Between the 2010 Census and 2020 Census the population in nursing homes and assisted living facilities decreased. However, this may reflect pandemic-related disruptions rather than a long-term shift. AMBAG will continue to monitor trends in this group quarters type.

The balance of group quarters—which encompasses types ranging from temporary shelters to certain types of farmworker housing—grew substantially between 2010 and 2020. With additional farmworker housing projects in the planning pipeline, the region is likely to see other group quarters increase in the future.

Figure 8: AMBAG Group Quarters Population in 2010 and 2020

*Group Quarters Population by Type, AMBAG Region, 2010 and 2020**



**Note: Values shown here reflect published decennial census counts, and do not reflect revisions made by DOF to the group quarters estimates that serve as the basis for the 2026 RGF.*

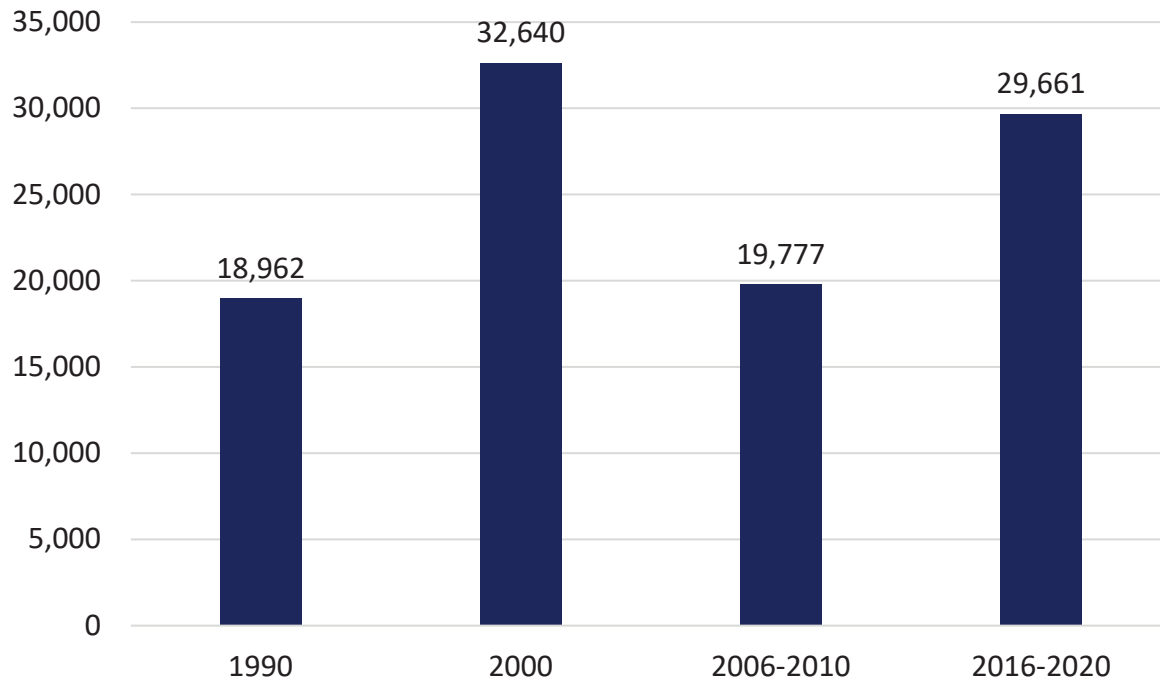
Source: U.S. Census Bureau, 2010 Census and 2020 Census.

¹⁸ While Fort Hunter Liggett (FHL) has a small permanent population, it is a large training facility and hosts a substantial number of trainees every year. Not only will it be important to follow FHL plans for expansion from a population perspective, but it will also be important to consider the presence of FHL in transportation planning given their heavy reliance on Highway 101.

Many AMBAG residents commute to jobs outside the region, principally to jobs in Santa Clara County. This net out-commuting means there are residents in the region who are not connected to the AMBAG region's job growth. Net out-commuting surged between 1990 and 2000 as the "dot.com boom" pushed Silicon Valley (Santa Clara County) job levels higher, fell during the Great Recession, and rose again in recent years (Figure 9).

Figure 9: Net Out-Commuting from AMBAG Region

Net Number of Commuters (Outflow Minus Inflow), 1990-2020



Sources: 1990 and 2000 are from Census Journey to Work and 2006-2010 and 2016-2020 are from American Community Survey "Commuting Flows" (Special Tabulations).

Comparison with 2022 RGF

The region is projected to add approximately 39,600 people between 2020 and 2050, an increase of 5% or approximately 1,300 people per year. Although the 2026 RGF extends the forecast horizon to 2050, population growth is expected to be slower than in the 2022 RGF. The 2050 projected regional population of 813,708 is lower than the 869,776 residents projected for year 2045 in the 2022 RGF (Table 5). This lower population forecast reflects slower growth than anticipated in recent years due to record low birth rates, stalled improvements in life expectancy, lower migration rates, and the COVID-19 pandemic.

Table 2: Comparison of Forecasts for Population

Forecast	2010	2015	2020	2023	2030	2035	2040	2045	2050
2022 RGF	732,708	762,241	774,729	789,012	824,992	842,189	857,828	869,776	N.A.
% Change		4%	2%	2%	5%	2%	2%	1%	N.A.
2026 RGF	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708
% Change		4%	1%	-2%	3%	1%	1%	1%	1%

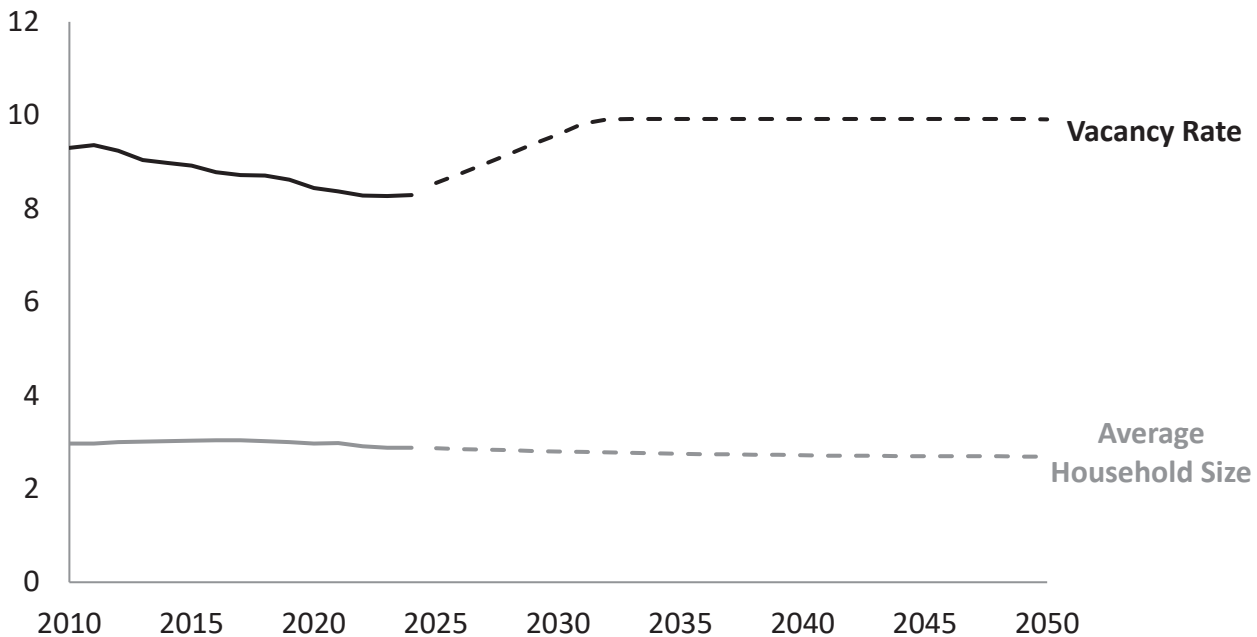
Sources: Historical data are from DOF. Forecast years were prepared by AMBAG and PRB.

Housing and Households

While population growth will slow, which reduces future housing demand, older people are more likely to live alone or in small households. This shift offsets the lower population forecast with a slight upward effect on housing demand. Between 2020 and 2050 the number of housing units in the AMBAG region is expected to grow by more than 46,600 (17%) to just under 317,000 units. The housing forecast reflects the latest data from the 2020 Census, 2023 American Community Survey, and 2023 estimates from DOF. These sources show rising household formation rates and decreasing average household size in the region in recent years.

After a decade of slow production in housing (an increase of just under 10,100 units between 2010 and 2020), the region's housing production has increased. The region added nearly 4,400 units between 2020 and 2023, even as the region's population shrank. The region is expected to add almost as much housing as population over the course of the forecast. .

As the region's population ages and construction activity continues, average household size is expected to get smaller and vacancy rates are expected to rise (Figure 10).

Figure 10: AMBAG Region Vacancy Rate Is Expected to Rise, Household Size Expected to Fall by 2050*Average Household Size and Vacancy Rate*

Sources: Data for 2010-2023 from DOF. Forecast years were prepared by AMBAG and PRB.

U.S. and California Housing Trends

There are no official housing stock projections for the U.S. nor for California. However, both experienced rapidly declining average household size and vacancy rates during the pandemic. Given population aging, declining average household size is likely for both in the future. Projected changes in vacancy rates will depend on residential construction, housing policies, and other factors.

AMBAG Region Housing Trends

As described above, the region is projected to add approximately 1,300 residents per year between 2020 and 2050. Taking average household size and vacancy rates into account, the resulting housing growth is expected to be between 1,500 and 1,600 per year between 2020 and 2050. This is higher than the recent growth of just under 1,100 housing units per year between 2020 and 2023.

It is worth noting that several jurisdictions in the AMBAG region have historically had relatively high vacancy rates, reflecting a mix of vacation rentals and second homes, particularly in coastal communities. In the 2010s there was some evidence that more homeowners were participating in the vacation rental market via platforms such as Airbnb and VRBO. However, during the pandemic vacancy rates fell to their lowest level in more than a decade. AMBAG will continue to monitor trends in vacancy rate for future forecasts.

Comparison with 2022 RGF

The region is projected to add approximately 46,600 housing units by 2050, for a total of approximately 317,000— an increase of 15%. The 2045 projected regional housing stock of 314,100 is slightly higher than the 304,900 housing units projected for year 2045 in the 2022 RGF, reflecting stronger housing growth.

Table 3: Comparison of Forecasts for Housing

Forecast	2010	2015	2020	2023	2030	2035	2040	2045	2050
2022 RGF	260,256	262,660	267,812	272,117	288,386	296,352	301,307	304,900	N.A.
% Change		1%	2%	2%	8%	3%	2%	1%	N.A.
2026 RGF	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990
% Change		1%	2%	2%	7%	3%	2%	1%	1%

Sources: Data for years 2010-2023 are from DOF. Forecast years were prepared by AMBAG and PRB.

Employment

The 2026 RGF projects that the region will add approximately 54,300 jobs (15% increase) between 2020 and 2050, for a total of just over 426,300 jobs by 2050. This increase reflects recovery from the 2020 recession that has already occurred and continued strong growth between 2023 and 2050. The regional growth rate is slightly slower than nation- and state-level forecasts, reflecting historical growth rates that have tended to be slightly slower than either the state or nation.

A Note About Employment Data

There are numerous sources of jobs data, all of which have different methodologies and results. Some sources rely on unemployment insurance system reporting while others reflect a broader spectrum of jobs, including self-employment and commission-based work. Because different data sources have different strengths and weaknesses, many regional planning agencies "triangulate" across multiple sources to improve the accuracy of their inventory.

AMBAG's process involves two primary sources and multiple supporting sources to develop an accurate inventory for the region. Because of the need to understand travel for all workers, AMBAG's employment inventory reflects all jobs, not just those covered by unemployment insurance. Extensive review showed that, compared with four other sources of employment data, AMBAG's estimates are reasonable—they are neither the lowest nor the highest employment estimate reported for the region.

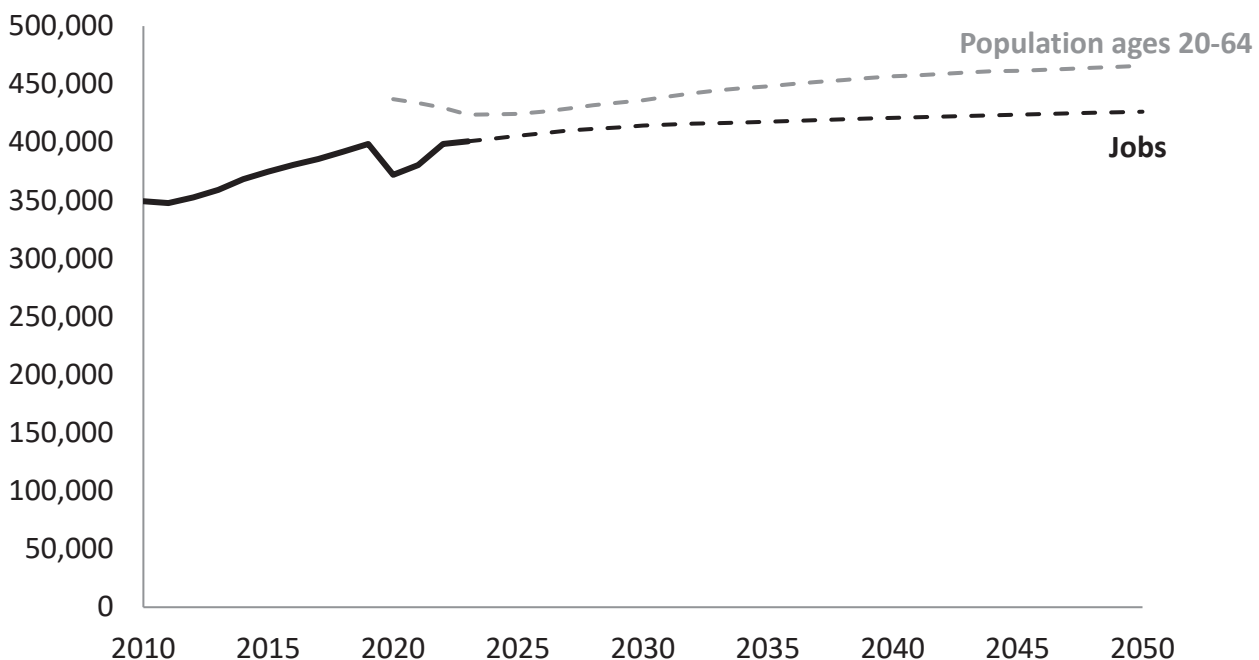
Additional detail on the employment inventory, as well as comparison with alternative sources, can be found in Attachment 2.

Job growth is expected across most employment sectors. The fastest-growing industries are likely to include Other Services and Health Care and Social Assistance. Notably, while some models for the U.S. predict declines in Agricultural job growth, the AMBAG region has experienced steady Agricultural job growth—a trend that is expected to continue. Conversely, Retail is expected to contract slightly, following existing trends in a shift from “brick-and-mortar” retail stores to online retail. AMBAG will continue to monitor these trends.

While a pattern of strong job growth may appear to be at odds with slowing population growth, the population slowdown is primarily a result of a smaller child (non-working age) population. As noted above, the adult population is expected to continue growing and can accommodate the projected increase in employment. Job growth is commensurate with expected growth in the population ages 20-64 (Figure 11).

Figure 11: Jobs Rebounded Post-Pandemic and Growth Is Expected to Be Steady in the Future

Employment and Population Ages 20-64, AMBAG Region, 2010-2050



Source: Data for years 2010-2023 are from AMBAG employment inventory (described in Attachment 2). Population by age and employment forecast years were produced by AMBAG and PRB.

Job projections to 2050 were developed for each major North American Industry Classification System (NAICS) industry category by projecting the AMBAG region share of state job growth based on the analysis of trends in the period from 2000 to 2022. The NAICS industries were then grouped into major industry sectors for the transportation model. Industry categories are described in Attachment 2.

U.S. and California Job Trends

The starting point for the AMBAG employment projections is an examination of future U.S. and California job growth for total jobs and major industry sectors. The U.S. job growth projections are based on the most recent forecast from the U.S. Bureau of Labor Statistics and an extrapolation of growth trends to 2050. California job growth projections are based on an industry-level forecast published by the California Department of Transportation, as well as data from the California Employment Development Department and PRB.

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

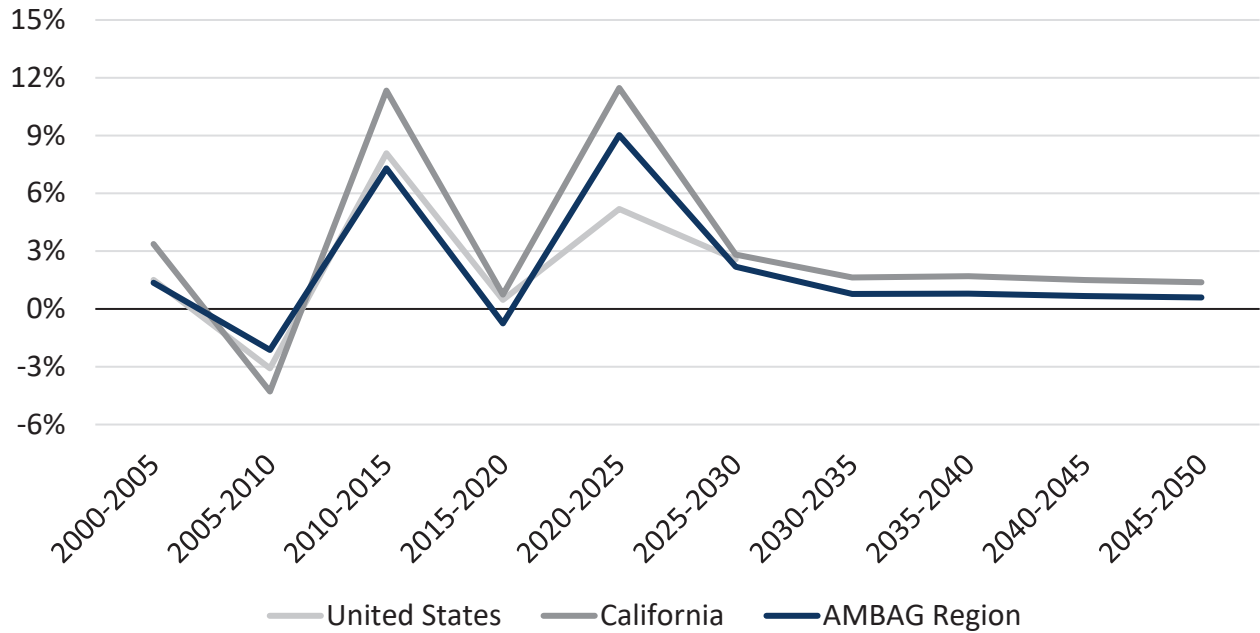
1. The AMBAG region projections were based on projections of job growth in the state. The state projections provide the pool of job opportunities and the AMBAG region projections reflect historical trends in the share of national and state job growth that will locate in the AMBAG region.
2. The AMBAG region share of state job growth is determined by the industry composition of job growth and the projected share of job growth locating in the AMBAG region. If state job growth is concentrated in sectors where the AMBAG region has a competitive advantage, the region's projected job growth will be higher than if state job growth is concentrated in sectors where the region has a below-average share of jobs and a relatively poor competitive position.
3. The analysis of competitive advantage is focused on sectors in the AMBAG region's economic base. The region's economic base consists of those sectors that sell a high proportion of goods and services to customers outside the region. They export goods and services to customers in national and global markets as well as markets throughout California. Key examples of economic base sectors in the AMBAG region are agriculture and tourism. The UCSC campus and Salinas Valley State Prison are also examples of activities that do not primarily serve local residents.

The nation is expected to add 33 million jobs between 2020 and 2050 for an increase of 21%. Growth, nationwide, is expected to be fairly constant throughout the forecast period. The state of California's growth is similar to the national rate.

The state is projected to see a 22% increase in total jobs between 2020 and 2050. The pattern of California industry job growth is shown below and was used in developing the AMBAG region job projections (Table 4).

The AMBAG region experienced job growth slower than the state, and similar to the nation between 2010 and 2019 (Figure 12). From 2020 to 2025, the region's job growth rate is expected to be slightly below the state's rate, but much higher than the national rate. In later forecast years, the region is projected to experience job growth at a slightly slower rate than the state. The primary reason for this below-average job growth is the region's below-average concentration in fast-growing sectors such as information and professional services. The region also has a below-average exposure to growth in foreign trade.

Figure 12: AMBAG Region Employment Growth Has Typically Been Slightly Slower Than California's
Percent Change in Employment from Prior Period



Sources: Data for years 2000-2023 from the U.S. Bureau of Labor Statistics, California Employment Development Department, and AMBAG employment inventory. Forecast years are from U.S. Bureau of Labor Statistics, Caltrans, California Employment Development Department. Forecast years were prepared by AMBAG and PRB.

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

Table 4: California Jobs by Major Industry (000s)

	2010	2015	2020	2050	Avg. Annual Growth Rate		
					2010 2015	2015 2020	2020 2050
Agriculture	383.2	422.8	407.1	425.6	2.0%	-0.8%	0.1%
Mining	24.7	26.6	22.5	23.6	1.5%	-3.3%	0.2%
Construction	560.1	732.4	857	922.3	5.5%	3.2%	0.2%
Manufacturing	1,249.3	1,305.0	1,267.5	1,297.4	0.9%	-0.6%	0.1%
Wholesale	630.9	692.3	644.3	692.9	1.9%	-1.4%	0.2%
Retail	1,509.2	1,648.3	1,513.8	1,635.2	1.8%	-1.7%	0.3%
Transp., Warehousing, Utilities	468	560.4	736.3	1,045.5	3.7%	5.6%	1.2%
Information	429.9	489.4	536.5	651.8	2.6%	1.9%	0.7%
Financial Serv.	761.2	803.2	819.1	850.3	1.1%	0.4%	0.1%
Prof. & Business Serv.	1,014.3	1,193.4	1,272.5	1,563.6	3.3%	1.3%	0.7%
Educ. & Health Serv.	2,131.8	2,117.3	3,988.6	3,749.3	-0.1%	13.5%	-0.2%
Leisure & Hospitality	2,132.1	2,464.9	2,056.8	2,431.3	2.9%	-3.6%	0.6%
Other Services (excl. gov't)	483.6	543.9	583.3	667.7	2.4%	1.4%	0.5%
Government	2,448.4	2,463.0	2,636.6	2,720.9	0.1%	1.4%	0.1%
Self Employed	1,192.6	1,180.9	1,275.7	1,360.6	-0.2%	1.6%	0.2%
Total Jobs	15,858.7	17,655.6	17,787.6	21,685.0	2.2%	0.1%	0.7%

Sources: Data for years 2005-2020 from the Employment Development Department. Forecast years are from Caltrans and the California Employment Development Department.

The projections show substantial differences in the expected growth rate among industries between 2020 and 2050 and these differences tell a story about where job growth is expected and where job levels will remain flat or decline. These differences directly influenced the AMBAG region job projections described below.

It is important to note that the statewide projections listed above were completed during the coronavirus pandemic. Projections will be updated as new information becomes available. AMBAG will begin the next update to the RGF in 2027.

The AMBAG Region Economy and Job Growth

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

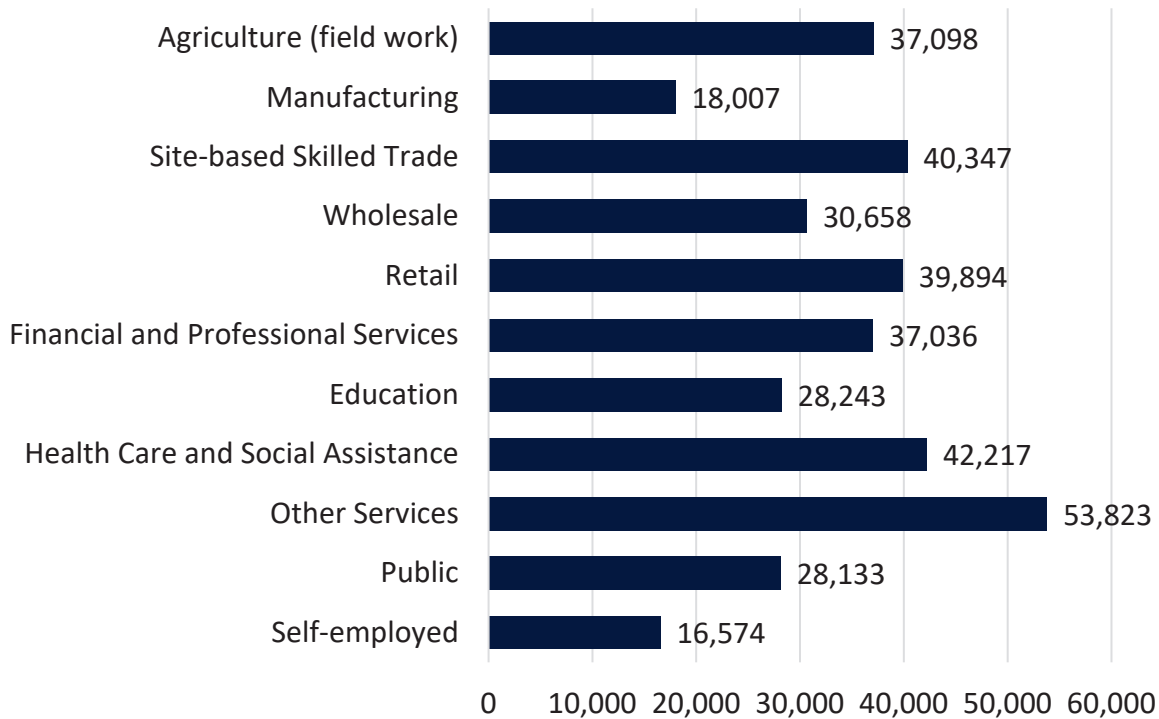
The database used for analysis and projections consists of annual industry employment data from 1990 through 2023 from the California Employment Development Department for each of the three counties in the region which were then added together to produce an AMBAG region jobs database.

In addition to the historical time-series, beginning in 2015, AMBAG re-benchmarked employment data to more accurately reflect local employment and grouped the data into eleven categories for modeling purposes. This process is described in more detail in Attachment 2.

In 2020, the largest sectors were Other Services (including hotels, restaurants, and personal services), Health Care and Social Assistance, and Site-based Skilled Trade (Figure 13).

Figure 13: Other Services Account for More Jobs Than Any Industry in the AMBAG Region

Jobs by Industry, 2020



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

The AMBAG regional economy has an industry structure that is quite different in some ways than the statewide structure or the industry structure in regions like Southern California or the San Francisco Bay Area. One difference is the large share of jobs in Agriculture. Nearly 11% of total jobs in the AMBAG region are in Agriculture compared to just over 2% statewide. Other sectors with above average shares in the region include Public, Other Services, and Self Employed. Conversely, the AMBAG region has a below average share of jobs in the fast-growing, high-wage Financial and Professional Services sector.

AMBAG Region Jobs by Industry

The AMBAG region is expected to have moderate job growth between 2020 and 2050, with some industries growing faster than average.

Table 5: AMBAG Region Jobs by Major Industry

	2020	2023	2030	2035	2040	2045	2050	Avg. Annual Growth Rate	
								2020 2023	2020 2050
Agriculture	37,098	41,050	44,044	44,182	44,317	44,454	44,590	3.4%	0.6%
Manufacturing	18,007	21,135	21,621	21,592	21,517	21,456	21,426	5.5%	0.6%
Site-based Skilled Trade	40,347	42,959	44,522	44,259	44,767	45,190	45,608	2.1%	0.4%
Wholesale	30,658	33,398	35,134	35,183	35,286	35,406	35,545	2.9%	0.5%
Retail	39,894	41,219	40,702	39,841	38,927	37,993	37,039	1.1%	-0.4%
Financial and Professional Services	37,036	38,763	39,208	39,506	39,671	39,739	39,747	1.5%	0.2%
Education	28,243	28,178	28,665	29,328	29,924	30,477	30,995	-0.1%	0.3%
Healthcare and Social Assistance	42,217	44,140	46,456	48,066	49,509	50,772	51,888	1.5%	0.7%
Other Services	53,823	65,849	69,275	70,691	72,008	73,255	74,459	7.0%	1.1%
Public	28,133	27,591	28,275	28,588	28,876	29,166	29,458	-0.6%	0.2%
Self-employed	16,574	16,577	16,577	16,458	16,200	15,900	15,580	0.0%	-0.2%
Total	372,030	400,859	414,479	417,694	421,002	423,808	426,335	2.5%	0.4%

Sources: Data for 2020 are based on AMBAG's employment inventory (refer to Attachment 2). Forecast years were prepared by AMBAG and PRB.

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

- Agricultural job growth has remained strong for the past 10 years, and while the rate of growth is expected to slow, the region's Agricultural industry will still grow faster than state or national projections.
- The region lost Manufacturing jobs during the pandemic, but recent years have seen a turnaround. Growth is expected to be slow and even plateau in later years.
- Site-based Skilled Trade (which includes construction) saw job losses during the pandemic but then rebounded. Future growth is expected to be moderate.
- Wholesale growth is expected to remain at a slow and steady growth rate through the forecast.
- Retail rebounded in the post-pandemic period, but the long-term trend has been towards fewer retail jobs. With the growth of online shopping, self-checkout, and other changes, retail is expected to continue to shrink over the course of the forecast.

- Financial and Professional Services is expected to grow at a slow rate.
- Education growth will likely slow as population growth slows.
- Healthcare and Social Assistance has seen steady growth. This is expected to continue as the population ages and demand for health services increases.
- Other Services (including hotels, restaurants, and personal services) lost jobs in the AMBAG region during the pandemic but has since rebounded. Growth is expected to be moderate in the future.
- The Public sector is expected to see modest growth in the future.
- Self-employment tends to be counter-cyclical as people who lose their wage-and-salary job during a recession may turn to self-employment. Growth forecasts are based primarily on population growth. With an aging population, this sector is expected to shrink.

Comparison with 2022 RGF

The region is projected to add approximately 54,300 jobs between 2020 and 2050, for a total of just over 426,300 jobs by 2050, which is an increase of 15%. The 2045 projected number of jobs, 423,808, is slightly lower than the 442,824 jobs projected for year 2045 in the 2022 RGF.

Table 6: Comparison of Forecast Employment

Forecast	2010	2015	2020	2023	2030	2035	2040	2045	2050
2022 RGF	351,735	377,335	406,280	407,756	418,132	425,845	434,147	442,824	N.A.
% Change		7%	8%	0%	3%	2%	2%	2%	N.A.
2026 RGF	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335
% Change		7%	-1%	8%	3%	1%	1%	1%	1%

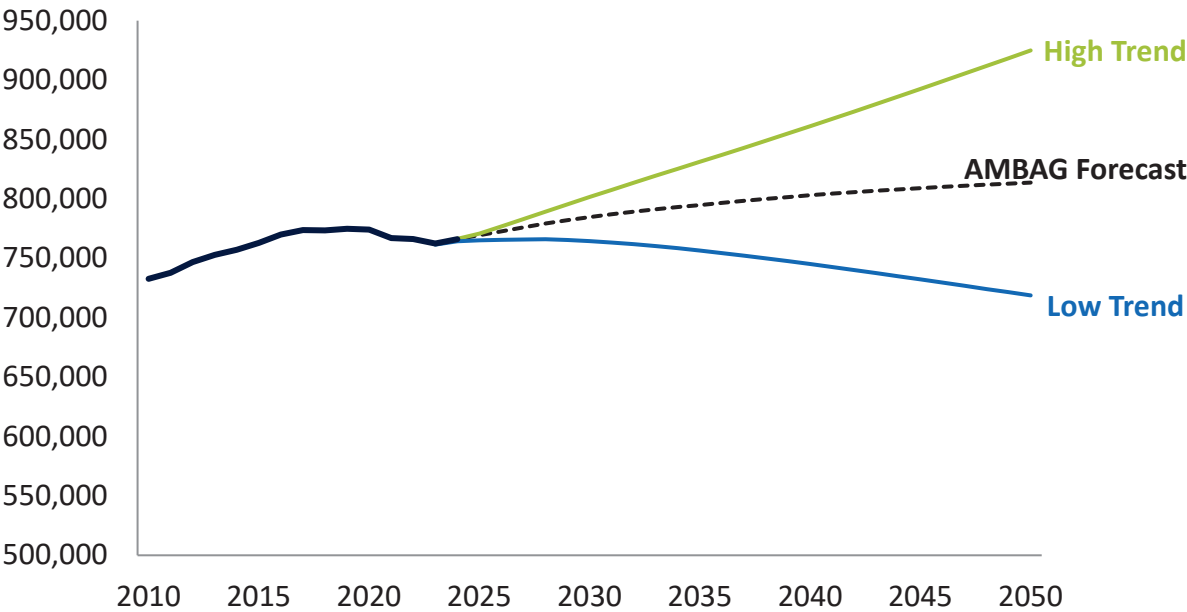
Sources: Data for years 2010-2023 are based on AMBAG's employment inventory (refer to Attachment 2). Forecast years were prepared by AMBAG and PRB.

Accuracy of the Forecast

In any forecast, the uncertainty of the prediction rises over time. To acknowledge this uncertainty, PRB produced population projections that reflect a “high growth” scenario that incorporated high projections for migration and fertility and low projections for mortality as well as a “low growth” scenario that incorporated low projections for migration and fertility and high projections for mortality. These scenarios were compared with the AMBAG forecast. (Figure 14).

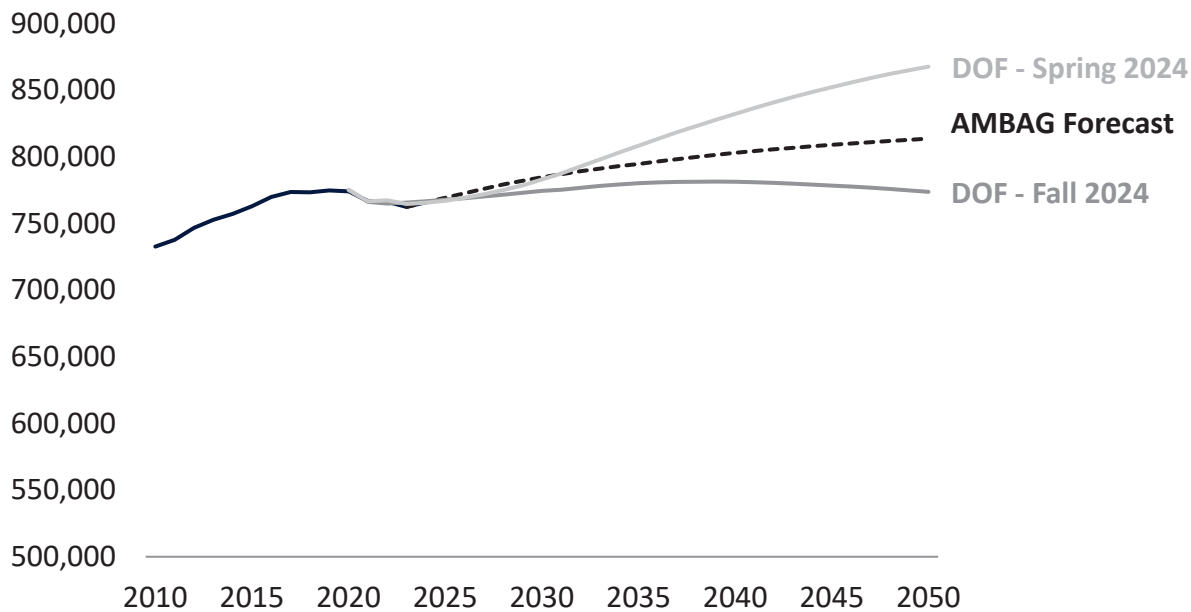
Figure 14: AMBAG Region Forecast Is Between High and Low Alternative Forecasts

Population Estimates and Projections, by Scenario, 2010-2050



Source: Projection alternatives analysis produced by Population Reference Bureau.

In addition, PRB conducted additional forecast robustness checks, which included comparing against other publicly available forecasts for the region such as forecasts from DOF (Figure 15).

Figure 15: AMBAG Region Forecast Is Between the Two Most Recent DOF Forecasts*Population Estimates and Projections, Compared with DOF Forecasts, 2010-2050**Sources: Data for years 2010-2024 from DOF. Forecast years were prepared by AMBAG and PRB.*

PRB's validation work for the AMBAG forecast provides strong evidence that the forecast presented here reflects a reasonable expectation of future growth in the region.

Section 3: Subregional Forecast

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

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

Housing

To house the region's expected population growth, this forecast shows an increase of just over 46,600 housing units by 2050, for a total of approximately 317,000 units. Of that growth, 57.8% (approximately 27,000 houses) is expected to be in Monterey County, 12.7% (approximately 5,900 houses) is expected to be in San Benito County and 29.5% (approximately 13,700 houses) is expected to be in Santa Cruz County. Housing growth rates do not exactly parallel population growth rates because of local variations in average household size and vacancy rate, and because some population (e.g., at UCSC and CSUMB) is expected to be housed in group quarters facilities.

Table 7: Subregional Housing Forecast

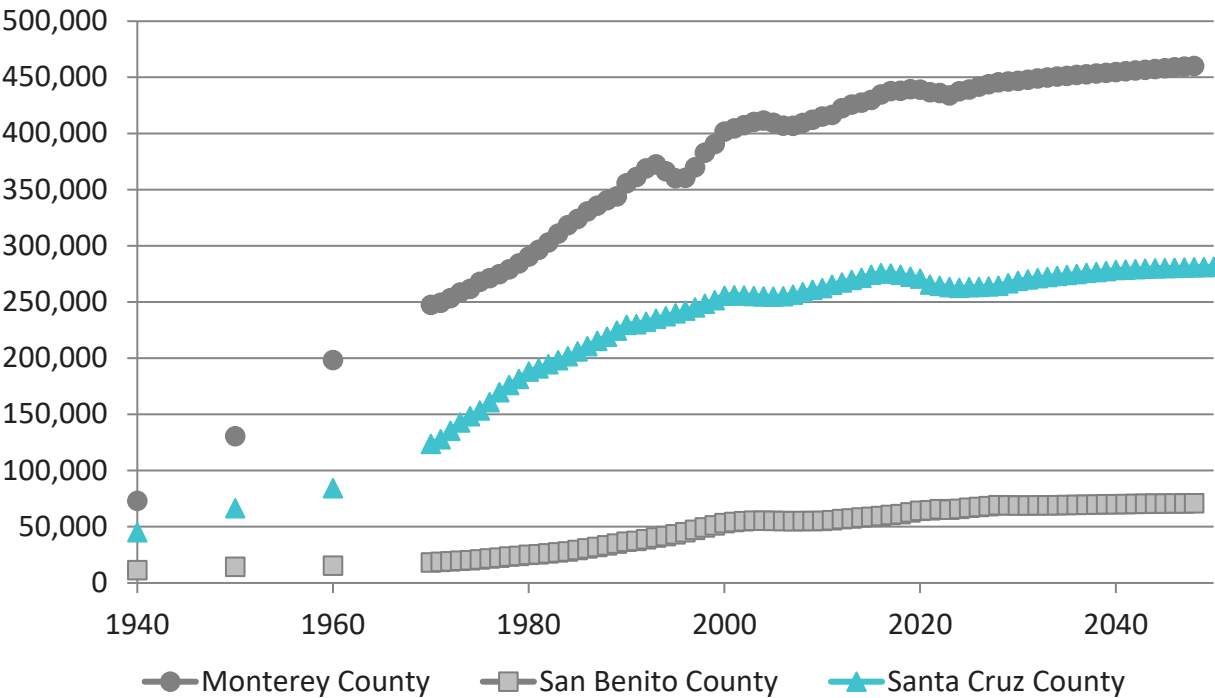
Geography	2020	2023	2030	2035	2040	2045	2050	Change 2020-2050	
								Num.	%
AMBAG Region	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%
Monterey County	143,631	145,965	157,426	162,788	166,736	168,963	170,605	26,974	19%
Carmel-By-The-Sea	3,056	3,067	3,135	3,232	3,300	3,344	3,374	318	10%
Del Rey Oaks	739	746	820	893	938	973	998	259	35%
Gonzales	2,088	2,091	3,105	3,188	3,244	3,277	3,293	1,205	58%
Greenfield	4,207	4,724	4,941	5,133	5,268	5,372	5,436	1,229	29%
King City	3,465	3,691	3,870	3,990	4,065	4,140	4,219	754	22%
Marina	8,022	8,444	11,268	11,637	11,740	11,809	11,833	3,811	48%
Marina balance	8,022	8,444	11,268	11,637	11,740	11,809	11,833	3,811	48%
CSUMB (portion)	0	0	0	0	0	0	0	0	n/a
Monterey	13,787	13,825	15,542	16,204	16,680	17,110	17,406	3,619	26%
Monterey balance	13,355	13,393	15,110	15,772	16,248	16,678	16,974	3,619	27%
Presidio & NSAM	432	432	432	432	432	432	432	0	0%
Pacific Grove	8,121	8,232	8,559	8,804	9,025	9,153	9,234	1,113	14%
Salinas	44,405	44,939	48,234	50,082	51,350	52,174	52,717	8,312	19%
Sand City	186	197	553	585	605	618	623	437	235%
Seaside	10,801	10,847	11,080	11,415	11,776	12,051	12,261	1,460	14%
Seaside balance	8,850	8,896	9,129	9,464	9,825	10,100	10,310	1,460	16%
Fort Ord (portion)	1,119	1,119	1,119	1,119	1,119	1,119	1,119	0	0%
CSUMB (portion)	832	832	832	832	832	832	832	0	0%
Soledad	4,524	4,633	5,183	5,663	6,064	6,146	6,210	1,686	37%
Soledad balance	4,524	4,633	5,183	5,663	6,064	6,146	6,210	1,686	37%
SVSP & CTF	0	0	0	0	0	0	0	0	n/a
Unincorporated	40,230	40,529	41,136	41,962	42,681	42,796	43,001	2,771	7%
Unincorp. balance	40,230	40,529	41,136	41,962	42,281	42,396	42,601	2,371	6%
CSUMB	0	0	0	0	400	400	400	400	n/a
San Benito County	20,365	21,576	24,143	24,861	25,516	25,997	26,293	5,928	29%
Hollister	12,182	13,006	15,236	15,636	15,888	16,058	16,164	3,982	33%
San Juan Bautista	903	909	926	955	973	984	992	89	10%
Unincorporated	7,280	7,661	7,981	8,270	8,655	8,955	9,137	1,857	26%
Santa Cruz County	106,345	107,165	111,820	115,389	117,570	119,124	120,092	13,747	13%
Capitola	5,485	5,507	5,887	6,242	6,491	6,634	6,715	1,230	22%
Santa Cruz	24,014	24,415	26,441	27,499	28,295	28,918	29,267	5,253	22%
Santa Cruz balance	23,466	23,867	25,756	26,539	27,060	27,683	28,032	4,566	19%
UCSC	548	548	685	960	1,235	1,235	1,235	687	125%
Scotts Valley	4,934	4,994	5,400	5,643	5,844	5,988	6,088	1,154	23%
Watsonville	14,585	14,699	15,524	16,000	16,331	16,523	16,642	2,057	14%
Unincorporated	57,327	57,550	58,568	60,005	60,609	61,061	61,380	4,053	7%

Sources: Data for 2020-2023 are from DOF. Forecast years were prepared by AMBAG and PRB.

Population

This forecast projects that the region’s population will grow by approximately 39,600 people between 2020 and 2050, for a total population of just above 813,700 in 2050. Of that growth, 56.2% (approximately 22,200 people) is expected to be in Monterey County, 17.2% (approximately 6,800 people) is expected to be in San Benito County and 26.6% (approximately 10,500 people) is expected to be in Santa Cruz County.

Figure 16: Population in Monterey, San Benito and Santa Cruz Counties, 1940-2050



Sources: Data for years 1940-2023 are from the U.S. Census Bureau and DOF. Forecast years were prepared by AMBAG and PRB.

Table 8: Subregional Population Forecast

Geography	2020	2023	2030	2035	2040	2045	2050	Change 2020-2050	
								Num.	%
AMBAG Region	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%
Monterey County	439,035	433,953	446,857	451,331	454,652	458,107	461,279	22,244	5%
Carmel-By-The-Sea	3,168	3,105	2,881	2,961	3,018	3,057	3,082	-86	-3%
Del Rey Oaks	1,579	1,559	1,670	1,782	1,850	1,912	1,958	379	24%
Gonzales	8,548	8,384	11,430	11,489	11,555	11,631	11,647	3,099	36%
Greenfield	18,782	20,155	21,149	21,371	21,498	21,557	21,633	2,851	15%
King City	13,395	13,968	14,871	14,938	14,975	15,044	15,158	1,763	13%
Marina	21,738	22,269	27,568	29,100	31,706	33,071	34,305	12,567	58%
Marina balance	20,813	21,546	25,707	25,839	25,845	25,910	25,944	5,131	25%
CSUMB (portion)	925	723	1,861	3,261	5,861	7,161	8,361	7,436	804%
Monterey	28,474	27,189	28,714	29,428	29,995	30,526	30,859	2,385	8%
Monterey balance	24,258	24,114	24,514	25,228	25,795	26,326	26,659	2,401	10%
Presidio & NSAM	4,216	3,075	4,200	4,200	4,200	4,200	4,200	-16	0%
Pacific Grove	14,978	14,872	15,223	15,404	15,602	15,768	15,894	916	6%
Salinas	161,776	160,870	161,947	162,791	163,127	163,871	164,615	2,839	2%
Sand City	368	378	1025	1068	1092	1,113	1,121	753	205%
Seaside	32,731	30,187	30,507	30,906	31,521	32,120	32,626	-105	0%
Seaside balance	25,080	24,971	23,652	24,051	24,666	25,265	25,771	691	3%
Fort Ord (portion)	4,202	2,112	3,751	3,751	3,751	3,751	3,751	-451	-11%
CSUMB (portion)	3,449	3,104	3,104	3,104	3,104	3,104	3,104	-345	-10%
Soledad	27,550	26,462	26,061	26,174	26,176	25,754	25,292	-2,258	-8%
Soledad balance	19,433	19,565	20,887	21,962	22,612	22,685	22,900	3,467	18%
SVSP & CTF	8,117	6,897	5,174	4,212	3,564	3,069	2,392	-5725	-71%
Unincorporated	105,948	104,555	103,811	103,919	102,537	102,683	103,089	-2,859	-3%
Unincorp. balance	103,407	102,014	101,276	101,384	101,302	101,448	101,854	-1,553	-2%
CSUMB	2,541	2,541	2,535	2,535	1,235	1,235	1,235	-1306	-51%
San Benito County	64,209	65,165	68,913	69,294	69,977	70,662	71,030	6,821	11%
Hollister	41,675	42,547	45,633	45,691	45,745	45,850	45,884	4,209	10%
San Juan Bautista	2,084	2,032	2,035	2,049	2,066	2,083	2,098	14	1%
Unincorporated	20,450	20,586	21,245	21,554	22,166	22,729	23,048	2,598	13%
Santa Cruz County	270,861	263,338	268,914	274,095	278,507	280,258	281,399	10,538	4%
Capitola	9,859	9,558	10,070	10,635	11,029	11,262	11,395	1536	16%
Santa Cruz	64,695	62,929	68,057	71,343	74,839	75,583	75,950	11,255	17%
Santa Cruz balance	46,287	44,385	45,557	46,343	46,839	47,583	47,950	1,663	4%
UCSC	18,408	18,544	22,500	25,000	28,000	28,000	28,000	9,592	52%
Scotts Valley	12,069	11,872	12,322	12,603	12,887	13,094	13,235	1,166	10%
Watsonville	51,809	50,820	51,475	51,835	52,005	52,180	52,251	442	1%
Unincorporated	132,429	128,159	126,990	127,679	127,747	128,139	128,568	-3,861	-3%

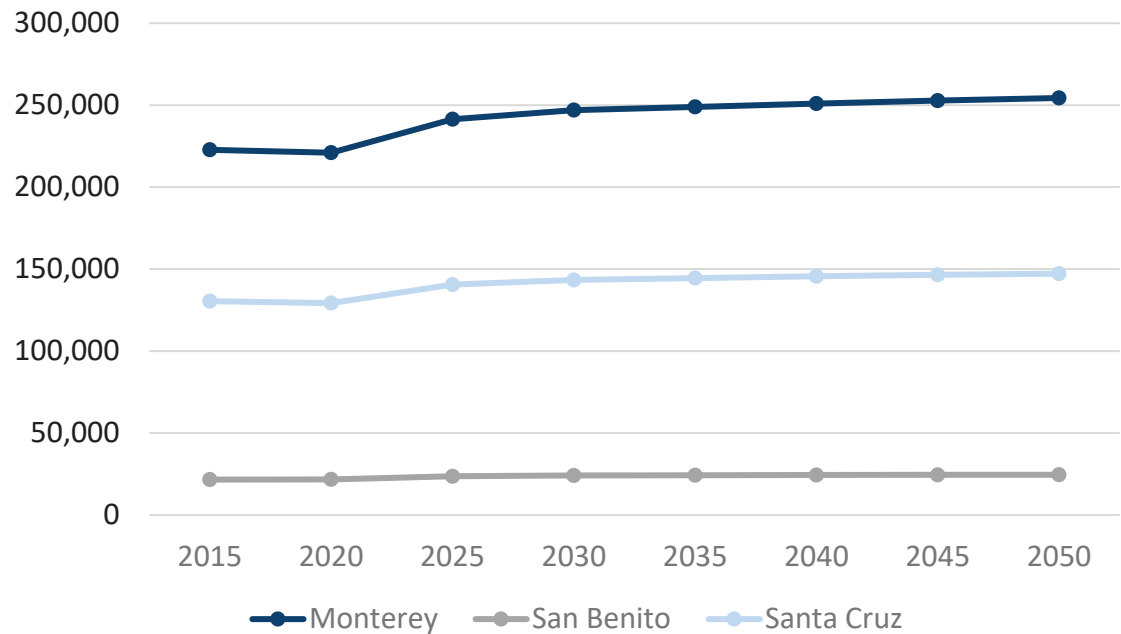
Sources: Data for years 2020-2023 are from DOF. Forecast years were prepared by AMBAG and PRB.

Employment

The 2026 RGF projects that the region will add about 54,300 jobs between 2020 and 2050, for a total of just over 426,300 jobs by 2050. Of that growth, 61.4% (approximately 33,400 jobs) is expected to be in Monterey County, 5.3% (approximately 2,900 jobs) is expected to be in San Benito County and 33.2% (approximately 18,000 jobs) is expected to be in Santa Cruz County.

Figure 17: Employment by County

Number of Jobs, 2025-2050



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

Table 9: Subregional Employment Forecast

Geography	2020	2023	2030	2035	2040	2045	2050	Change 2020 2050	
								Num.	%
AMBAG Region	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%
Monterey County	221,062	238,377	247,012	248,938	251,013	252,803	254,426	33,364	15%
Carmel-By-The-Sea	3,142	3,523	3,629	3,656	3,676	3,689	3,703	561	18%
Del Rey Oaks	670	738	766	772	771	770	771	101	15%
Gonzales	5,864	6,374	6,677	6,705	6,757	6,792	6,826	962	16%
Greenfield	7,300	7,866	8,336	8,356	8,377	8,400	8,415	1,115	15%
King City	7,562	7,987	8,242	8,320	8,396	8,456	8,511	949	13%
Marina	6,030	6,430	6,645	6,717	6,809	6,895	6,970	940	16%
Monterey	34,922	37,776	38,707	39,105	39,471	39,763	40,021	5099	15%
Pacific Grove	7,049	7,815	8,069	8,163	8,247	8,324	8,396	1,347	19%
Salinas	73,028	78,226	81,149	81,891	82,707	83,438	84,103	11075	15%
Sand City	1,913	2,086	2,164	2,160	2,164	2,173	2,173	260	14%
Seaside	9,533	10,026	10,266	10,350	10,430	10,492	10,548	1015	11%
Soledad	8,736	9,184	9,500	9,533	9,588	9,635	9,683	947	11%
Unincorporated	55,313	60,346	62,862	63,210	63,620	63,976	64,306	8,993	16%
San Benito County	21,703	23,390	24,096	24,229	24,378	24,496	24,607	2,904	13%
Hollister	14,432	15,484	15,912	16,013	16,129	16,216	16,289	1857	13%
San Juan Bautista	498	548	568	578	584	590	596	98	20%
Unincorporated	6,773	7,358	7,616	7,638	7,665	7,690	7,722	949	14%
Santa Cruz County	129,265	139,092	143,371	144,527	145,611	146,509	147,302	18,037	14%
Capitola	11,280	12,169	12,485	12,559	12,622	12,662	12,689	1,409	12%
Santa Cruz	40,483	43,059	44,196	44,649	45,062	45,417	45,737	5254	13%
Scotts Valley	9,298	10,206	10,447	10,484	10,504	10,517	10,525	1,227	13%
Watsonville	26,453	28,125	29,061	29,234	29,456	29,637	29,804	3351	13%
Unincorporated	41,751	45,533	47,182	47,601	47,967	48,276	48,547	6,796	16%

Sources: Data for years 2020-2023 from AMBAG employment inventory. Forecast years were prepared by AMBAG and PRB.

Accuracy of the Subregional Forecast

There are no publicly available jurisdiction-level forecasts that can be used for validating AMBAG's subregional forecast. However, AMBAG and PRB compared each element of this forecast to the forecast used in the 2045 MTP/SCS and found that much of the difference is the result of new regional control totals and updated data. Perhaps most importantly, AMBAG and PRB engaged in a robust process of local review that included an opportunity for initial input and additional opportunities for review and comment on draft results.

Following the preparation of the regional forecast figures, PRB began the process of disaggregating the figures to each of the jurisdictions using historical trends to develop a baseline disaggregated forecast.

AMBAG and PRB also requested development pipeline information from each jurisdiction to inform the forecast, particularly the early years. The baseline trends and jurisdiction input provided the foundation for a preliminary forecast.

After developing the preliminary forecast, based on historical trends and information gathered on projects in the development pipeline, AMBAG and PRB shared results with staff at each of the cities and counties for their review and feedback. PRB made technical adjustments to the forecast to reflect feedback received from jurisdictions, such as adding additional projects to the development pipeline. These efforts resulted in a final draft forecast that was accepted by the AMBAG Board.

Section 4: Demographic History of the AMBAG Region

The AMBAG region's population grew at a faster rate than California in the 1960s and 1970s and grew at approximately the same rate as the state in the 1980s (24% in AMBAG region, 26% statewide). Both the state and the AMBAG region grew at the same rate in the 1990s (14%). The AMBAG region's growth fell far below the statewide average between 2000 and 2010, increasing by only 3% while the state grew by 10%. From 2010 to 2020 both the state and the AMBAG region grew at similar rates (7% and 6%, respectively).

AMBAG Region: 1970 to 1990

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

AMBAG Region: 2000 to 2010

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

AMBAG Region: 2010 to 2020

From 2010 to 2020, the region continued to experience slow growth. From 2013 to 2019, the region grew by less than 1% each year. In 2018, the region even saw a small amount of population loss. The population grew by just over 41,300 (6%) during the period between 2010 and 2020.

It is important to note that there were substantial challenges with conducting an accurate 2020 Census due to the global COVID-19 pandemic (refer to the section “Data Discrepancies and Challenges With 2020 Census” for more information).

AMBAG Region: 2020 to 2023

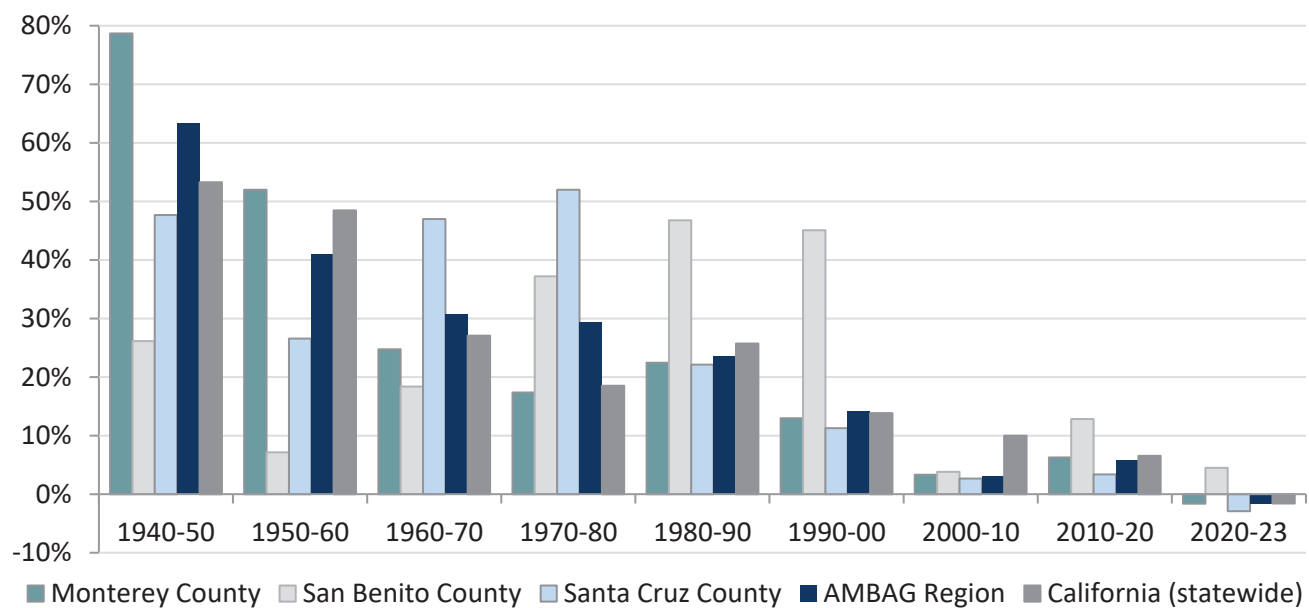
The COVID-19 pandemic had a drastic effect on the region. From 2020 to 2021 the region lost more than 7,000 residents, including many college students who left during campus closures. Continued population loss followed in 2022 and 2023—(800 and 3,700 residents, respectively). In 2023, the region had approximately 11,600 fewer people than it did in 2020.

Demographic History of AMBAG Counties

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

Figure 18: Population Growth Rates in Monterey County, San Benito County, Santa Cruz County, AMBAG Region and California (statewide) 1940-2023

Percent Change in Population During Interval



Source: DOF

Monterey County

Between 1960 and 2000, Monterey County grew at a rate slower than the AMBAG region as a whole. From 2000 to 2010 and 2010 to 2020 Monterey County grew at the same rate as the region (Figure 18).

As a result of the closure of Fort Ord, Monterey County experienced a population decline in the middle of the 1990s, yet population growth rebounded later in the decade. The county registered 13% growth (an increase of 46,100) between 1990 and 2000 (Figures 18).

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

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

The following decade saw much slower growth, with an increase of less than 13,300 (3%) between 2000 and 2010. Five jurisdictions lost population (Carmel-By-The-Sea, -9%; Del Rey Oaks, -2%; Monterey, -6%; Pacific Grove, -3%; unincorporated Monterey County, -1%). The City of Seaside remained virtually unchanged.

From 2010 to 2020, the cities of Greenfield, Marina, and Sand City each grew by more than 10%. The unincorporated area gained just over 5,700 people (6%). Carmel and Soledad each lost more than 200 population.

From 2020 to 2023, Monterey County lost roughly 5,100 residents. The cities of Seaside and Monterey saw the largest population declines of -8% and -5%, respectively. Despite an overall loss, there were pockets of population growth in the county. The cities of Greenfield (7%), King City (4%), and Sand City (3%) experienced growth during the same period.

San Benito County

While San Benito County grew at a rate much slower than the AMBAG region prior to the 1970s, the county saw rapid population growth in the 1970s, 1980s, and 1990s, a dip in the early 2000s, and a return to rapid growth between 2010 to 2020 (Figure 18).

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

San Benito's population growth slowed to 4% (2,000 population) between 2000 and 2010. The trend of the 1990s was reversed: Hollister grew by only 1% while San Juan Bautista increased by 20%.

From 2010 to 2020 San Benito County grew faster than the region, with Hollister and San Juan Bautista growing by 19% and 12%, respectively.

From 2020 to 2023, San Benito County experienced a modest growth rate of just over 1%. Hollister grew by 2%. The unincorporated area grew by 1%. However, San Juan Bautista lost just over 2% of its population.

Santa Cruz County

Santa Cruz County grew at a rate faster than the AMBAG region in the 1960s and 1970s but grew more slowly in every other decade from 1940-2020 (Figure 18).

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

The County's growth slowed considerably, adding just under 6,800 population (3%) between 2000 and 2010. The fastest-growing jurisdiction in Santa Cruz County between 2000 and 2010 was Watsonville (16% including the annexation area, 11% without) followed by Santa Cruz (10%). Scotts Valley, which grew rapidly during the 1990s, showed only 2% population growth during the decade. Capitola's population fell during the decade (-1%).

Between 2010 and 2020, no jurisdiction in Santa Cruz grew by more than 10%. The fastest growing city, Santa Cruz, grew by 8% over this period, followed by Scotts Valley at 4%.

From 2020 to 2023, Santa Cruz County experienced a decline of more than 7,500 people, or -3% of its population. All jurisdictions lost population over this time (Capitola, -3%; Santa Cruz, -3%; Scotts Valley, -2%; Watsonville, -2%; Unincorporated, -3%).

Homelessness

As a result of high housing costs, housing instability and homelessness are of increasing concern for the region. Although quantifying the exact number of people experiencing homelessness is notoriously difficult, every effort is made to ensure that the unhoused population is accounted for in the

forecast.¹⁹ Those experiencing homelessness are counted in each decennial census (often in group quarters or where they are “doubled up” with friends or relatives), and they are born, move, and age like anyone else. As such, they are accounted for in the base population and in projections.

Although data are limited, two data sources offer clues to the magnitude of homelessness in the AMBAG region. The first, more limited measure is the Point-in-Time count data from the U.S. Department of Housing and Urban Development. Their estimate for January 2024 was 2,436 individuals experiencing homelessness in Monterey County.²⁰ For Santa Cruz County the 2024 count was 1,850. And for San Benito County it was 621.

For the 2023-24 school year, Monterey County reported 12,660 students experiencing homelessness (17% of public K-12 students in the county).²¹ San Benito County had 474 unhoused students (4% of public K-12 students), and Santa Cruz County recorded 2,718 (7% of public K-12 students). In total, the AMBAG region had about 15,900 unhoused students, or 12% of all public K-12 students. The homeless public school student numbers all rose relative to the 2022-23 school year.

Housing status is strongly tied to the availability and affordability of housing. This forecast anticipates strong growth in housing, faster than the rate of population growth, which could help alleviate homelessness in the region.

Adjustments for Special Populations

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

¹⁹ Quantifying homelessness is notoriously difficult. Estimates vary widely and, at best, only capture a small share of the number of unhoused. The two most reputable sources, the U.S. Department of Housing and Urban Development (HUD) Point-in-Time Count, and the National Center for Education Statistics (NCES) Count of Students Experiencing Homelessness, have vastly different methodologies and coverage. For example, HUD data is limited to one night in January, while NCES only covers a school year. For a full explanation of the differences in methodology between HUD and NCES data and the advantages of each one, refer to PRB’s reference “How Many People in the United States Are Experiencing Homelessness?” available at <https://www.prb.org/resources/how-many-people-in-the-united-states-are-experiencing-homelessness/>.

²⁰ County of Monterey. (2024). Homelessness Data. <https://www.countyofmonterey.gov/government/departments-a-h/administrative-office/homelessness-strategies-and-initiatives/homelessness-data>

²¹ California Department of Education. 2024. “2023-24 Homeless Student Enrollment by Dwelling Type.” <https://dq.cde.ca.gov/dataquest/DQCensus/HmlsEnrByDTLevels.aspx?aggllevel=State&cds=00&year=2023-24>

outside the authority of local land use agencies and that change based on policy, rather than demographic, factors.

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

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

Special populations include people associated with military bases, tourists, prisons, and colleges and universities. The size of a special population may have no connection to the general trends affecting the area. A special population can be stable for long periods of time, balloon quickly, deflate, or, in the case of military bases, disappear rapidly through a closure program. It is best to develop a detailed understanding of the nature of each special population and set out its projection separately.²²

Historically, the AMBAG region has been home to several “special populations” including the military resident populations at Fort Ord, and Presidio and Naval Support Activity Monterey, students at UCSC and CSUMB, and inmates at SVSP and CTF.

The following discussion provides historical context for special populations in the region.

History of Special Populations in the AMBAG Region

Fort Ord

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

*Fort Ord has been a significant presence in Monterey County since 1917... maintained a large military population numbering approximately 14,500 military personnel and 17,000 family members of active-duty personnel... the resident population of Fort Ord totaled 31,270 in 1991.*²³

In addition...

The on-post resident population was divided between the two municipalities of Marina and Seaside. Through 1990, 17,139 people (56%) were within the Seaside city limits and

²² Stuart Merc. (2012). “Projections and Demand Analysis.” Planning and Urban Design Standards. American Planning Association.

²³ Base Reuse Plan, Volume 1: Context and Framework. June 1997.

13,321 people (44%) were within the Marina city limits (Harding Lawson Associates, 1991, Workplan remedial investigation/feasibility study, Fort Ord, CA).²⁴

These population losses greatly affected the communities of Marina and Seaside. However, the forecast was developed using the 2000 to 2024 time period as a historical reference. By 2000 abnormalities in growth rates caused by the closure of Fort Ord had self-corrected. The Fort Ord Reuse Authority's mandate for overseeing the area ended in June 2020. Beginning with the 2022 RGF, and continuing in this 2026 RGF, the area has been projected as any other potential development in the AMBAG region, based on civilian plans and permits.

Presidio and Naval Support Activity Monterey

The Army Language School, later renamed the Defense Language Institute, and now referred to as Presidio and Naval Support Activity Monterey (NSAM) has been a presence in Monterey County since the end of World War II. NSAM also includes the Naval Postgraduate School. The number of people living in military housing, whether family housing or group quarters, both tend to be stable from year to year and are outside of local control. For these reasons, the 2026 RGF presumes no change to the population in future years.

University of California, Santa Cruz

Founded in 1965, the University of California, Santa Cruz grew to 9,800 students by the 1991-1992 academic year, 10,885 students by the 1999-2000 academic year, 16,300 full-time equivalent students in the 2009-2010 academic year, and more than 18,500 by the 2022-2023 academic year.²⁵ In meetings with AMBAG staff, UCSC staff indicated that they expect growth to 28,000 students by 2040. The 2026 RGF reflects 28,000 full-time equivalent students by 2040 and then holds this level constant from 2040 to 2050.²⁶

Although the 2026 RGF is consistent with the number of students anticipated in the UCSC Long Range Development Plan (LRDP), the two differ in other ways. The two documents serve different purposes. The LRDP is a plan for future growth at the university. The AMBAG RGF is the region's current best guess at what growth will occur between now and 2050. One difference is in the timing and number of group quarters anticipated for the university. While UCSC projects a robust expansion of student housing, AMBAG's RGF incorporates anticipated group quarters rates that result in a smaller forecast

²⁴ Base Reuse Plan, Volume 2: Reuse Plan Elements. June 1997.

²⁵ University of California, Santa Cruz. <https://iraps.ucsc.edu/enrollments/index.html> accessed December 2024 (and previously December 2012). Figures based on 3-quarter average measured in the spring quarter of the academic year.

²⁶ Student projections reflect full-time equivalent students. Student headcount will likely be higher.

of group quarters. AMBAG will continue to work with UCSC to track trends in student housing and will update future forecasts to reflect the latest data.

California State University, Monterey Bay

Founded in 1995, California State University Monterey Bay grew to 2,265 students during the 1999-2000 school year, nearly 5,000 students in 2009-2010, more than 7,000 students in 2016-2017, and fell to just under 6,400 in the 2022-2023 school year.²⁷ Although not created by the Base Reuse Plan, the University is a significant component of the Base Reuse Plan and as it continues to grow will help to stimulate the economic development of the Fort Ord Area. The 2022 CSUMB Master Plan Guidelines reference student enrollment growing to 12,700.²⁸ In meetings with AMBAG staff, CSUMB staff also indicated that they expect growth to 12,700 full-time equivalent students by 2050.²⁹

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

Salinas Valley State Prison (SVSP) and Correctional Training Facility (CTF)

Opened in 1996, SVSP has a maximum capacity of 4,400, according to the 2010 Master Plan Annual Report.³⁰ Annual reporting by DOF shows the facility had a resident population of 4,100 in 2000, 3,630 in 2010, just under 5,100 in 2020, and fell to just under 3,900 in 2023 (Table 10).³¹

Opened in 1946, CTF in Soledad was reported to have a design capacity of 3,301. However, according to annual reporting by the California Department of Corrections and Rehabilitation and counts from the 2000 and 2010 decennial census, the population housed there was roughly double the design capacity in 2000 and 2010. The count fell dramatically between 2010 and 2020—to just over 3,000 in 2020.³²

²⁷ California State University Monterey Bay. <https://csumb.edu/iar/enrollment/> and <http://about.csumb.edu/node/4287>.

²⁸ California State University Monterey Bay Master Plan Guidelines. 2022. <https://csumb.edu/media/csumb/section-editors/facilities/2022-master-plan/CSUMB-Master-Plan-Guidelines-2022.pdf>.

²⁹ Student projections reflect full-time equivalent students. Student headcount will likely be higher.

³⁰ Master Plan Annual Report: Calendar Year 2010. California Department of Corrections and Rehabilitation. January 2011.

³¹ California Department of Finance and California Department of Corrections and Rehabilitation.

³² U.S. Census Bureau and California Department of Corrections and Rehabilitation.

Table 10: Historical Special Population Counts

	1990	2000	2010	2020	2023
Fort Ord Military Population	31,270*	n/a	4,473	4,202	2,112
Presidio and Naval Support Activity Monterey Bay	n/a	n/a	4,227	4,216	3,075
University of California, Santa Cruz	9,800**	10,885	16,332	18,408	18,544
California State University, Monterey Bay	0	2,265	4,891	6,915	6,368
Salinas Valley State Prison	0	4,100	3,630	5,096	3,860
Correctional Training Facility	0	7,120	6,148	3,021	3,037

* *Estimate.*

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

Adjustments to the Population Projections

Developing Special and Non-Special Population Estimates

Special populations provide a challenge to the population projections because their growth and decline are often not determined by factors that impact the rates of change of the general population. This is particularly true of college students, prison inmates, military personnel and their dependents. Residents of nursing homes, while also a special population, share many of the characteristics of the general population, and their growth and decline often mirror the demographic changes of the larger community. To deal with the special population issue, a common procedure applied in population projections is to exclude the special populations and project the adjusted population separately, i.e., the total population minus the special population. At the end of the projection module, the special population is added back to the projected adjusted population to produce the projected total population. The special population is either held constant or projected separately.³³

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

Incorporating Special Populations into the Final Projections

As noted above, Fort Ord has closed, and remaining military populations are held constant throughout the remainder of the forecast.

³³ Stephan Rayer and Stanley Smith. (2009). "Subcounty Population Forecast Accuracy: An Analysis Beyond Size and Growth." <https://paa2009.populationassociation.org/papers/91361>

For the universities, master plan documents provide useful information about expected future populations. These resources can be used to fill in horizon-year projections, which are then kept constant for any remaining years of the AMBAG forecast.

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

In addition, for housing planned by the universities, AMBAG worked closely with CSUMB and UCSC to incorporate those housing and group quarters plans into the forecast. The plans include university-specific student and faculty housing developments as well as a unique project, the Cabrillo project, in which shared group quarters are planned in unincorporated Santa Cruz. Unlike other projects, the Cabrillo group quarters are not assigned to a specific institution because they will be shared by more than one institution of higher education.

The California Department of Corrections and Rehabilitation also produces some short-range projections, which were used to trend prison populations at SVSP & CTF. Because these populations are classified as group quarters, there are no associated impacts on housing calculations.

Adjustments for Annexations

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

History of Annexations in the AMBAG Region

In 2000 the City of Watsonville annexed a portion of unincorporated Santa Cruz County. Known as the Freedom-Carey annexation, the change was recorded in July 2000, after the 2000 decennial Census. Historical population estimates for the City of Watsonville, unincorporated Santa Cruz County, and Freedom-Carey annexation area are shown in Table 11 below.

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

If the annexation of 2,022 residents were simply attributed to the population growth of Watsonville between 2000 and 2010, it would account for 40% of the growth in the city's population during that period of time. Conversely, the loss of the annexed population would account for more than half of the decline in unincorporated population between 2000 and 2010.

Table 11: Historical Population Estimates for the Watsonville Annexation Area

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

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

While this information is important to note for long-term growth trends, the 2026 RGF did not reach back to 1990 or 2000. Instead, the 2026 RGF used 2010 (long after the annexation was complete) as the benchmark year for the housing shift-share model. As a result, this is the first AMBAG RGF since the annexation that did not need an annexation adjustment.

Future Annexations in the AMBAG Region

The City of Gonzales has a proposed annexation area that may increase its future growth. However, there is not an active application for annexation, so the area is not included in the Gonzales forecast. AMBAG will continue to track the potential for annexation and continue to coordinate with the city and with LAFCO to determine if or when to include the annexation area in future forecasts.

Attachment 1: List of Meetings & Attendees

2026 Regional Growth Forecast - One-on-One Meetings (Round 1)

Agency	Meeting Date	Meeting Time	AMBAG Attendees*	Other Attendees*
City of Hollister	10/25/2023	2:30 PM	Maura Twomey, Heather Adamson, Gina Schmidt	Eva Kelly and Ambur Cameron
City of Monterey	11/7/2023	2:00 PM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Kim Cole and Levi Hill
City of Marina	11/15/2023	1:00 PM	Maura Twomey (Zoom), Heather Adamson, Gina Schmidt, and Chris Duymich (Zoom)	Guido Persicone, Allison Hunter (Zoom), Troy Reinhalter (Raimi and Associates) (Zoom), and Megan Jones (Rincon)(Zoom)

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

2026 Regional Growth Forecast - One-on-One Meetings (Round 2)

Agency	Meeting Date	Meeting Time	AMBAG Attendees	Other Attendees
City of Scotts Valley	2/27/2024	11:00 AM	Heather Adamson, Gina Schmidt, Chris Duymich, and Paul Hierling	Taylor Bateman and Sarah Wikle
City of Capitola	2/27/2024	2:00 PM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Katie Herlihy and Brian Froelich
CSUMB	2/29/2024	10:00 AM	Heather Adamson, Gina Schmidt, Chris Duymich, Beth Jarosz (consultant), and Celena Mijares (consultant)	Kyle Jordan, Matthew McCluney, Julie Wyrick, and Brendon Coye
City of Santa Cruz	2/29/2024	2:15 PM	Heather Adamson, Gina Schmidt, and Chris Duymich	Lee Butler and Matt VanHua
City of Watsonville	3/1/2024	11:00 AM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Suzi Merriam and Justin Meek
City of Monterey	3/4/2024	10:00 AM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Kim Cole and Levi Hill
City of Seaside	3/4/2024	1:00 PM	Heather Adamson, Gina Schmidt, and Chris Duymich	Jose Bazua, Andrew Myrick, Alexia Rapoport, and Rick Medina
County of Santa Cruz	3/5/2024	11:00 AM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Stephanie Hansen, Mark Connolly, Matthew Sundt, Anais Schenk, Fernanda Dias Pini, and Jacob Lutz

2026 Regional Growth Forecast - One-on-One Meetings (Round 2)

City of Marina	3/6/2024	10:00 AM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Guido Persicone and Layne Long
County of Monterey	3/6/2024	1:00 PM	Heather Adamson, Gina Schmidt, and Chris Duymich	Craig Spencer, Melanie Beretti, and Darby Marshall
City of Del Rey Oaks	3/11/2024	11:00 AM	Heather Adamson, Gina Schmidt, and Chris Duymich	John Guertin and Denise Duffy (Consultant)
UCSC	3/13/2024	9:30 AM	Heather Adamson, Gina Schmidt, Chris Duymich, and Beth Jarosz (consultant)	Oxo Slayer and Jolie Kerns
City of Sand City	3/13/2024	12:30PM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Vibeke Norgaard and Anastazia Aziz (consultant)
County of San Benito	3/14/2024	11:00 AM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Abraham Prado, Arielle Goodspeed, and Stephanie Reck
City of Hollister	3/14/2024	1:30 PM	Heather Adamson, Gina Schmidt, and Chris Duymich	Eva Kelly
City of Salinas	3/18/2024	11:00 AM	Heather Adamson, Gina Schmidt, and Chris Duymich	Lisa Brinton, Grant Leonard, and Jonathan Moore
City of Soledad	3/18/2024	1:30 PM	Heather Adamson, Gina Schmidt, and Chris Duymich	Megan Hunter, Kao Nou Yang, Ariana Mora-Jacobo, and Beatriz Trujillo
City of Monterey	3/22/2024	8:30 AM	Maura Twomey, Heather Adamson, and Bhupendra Patel	Hans Ulsar, Kim Cole, and Levi Hill
City of Carmel-By-The-Sea	3/25/2024	1:00 PM	Heather Adamson and Chris Duymich	Brandon Swanson and Marnie Waffle

2026 Regional Growth Forecast - One-on-One Meetings (Round 2)

City of Pacific Grove	3/25/2024	3:00 PM	Heather Adamson and Chris Duymich	Karen Vaughn and Alyssa Kroeger
City of San Juan Bautista	3/26/2024	10:00 AM	Heather Adamson and Chris Duymich	Don Reynolds
City of Greenfield	3/27/2024	11:00 AM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Paul Mugan
County of Monterey	3/28/2024	9:30 AM	Maura Twomey, Heather Adamson, and Gina Schmidt	Melanie Beretti and Darby Marshall
City of Gonzales	3/28/2024	1:00 PM	Heather Adamson, Gina Schmidt, and Chris Duymich	Taven Kinison Brown
City of King	3/28/2024	3:00 PM	Heather Adamson, Gina Schmidt, and Chris Duymich	Doreen Liberto and Esmeralda Alvarez
County of Santa Cruz	3/29/2024	9:00 AM	Maura Twomey, Heather Adamson, Gina Schmidt, and Chris Duymich	Stephanie Hansen, Mark Connolly, Matthew Sundt, Anais Schenk, Fernanda Dias Pini, and Jacob Lutz

2026 Regional Growth Forecast - One-on-One Meetings (Round 3)

Agency	Meeting Date	Meeting Time	AMBAG Attendees	Other Attendees
City of Sand City	5/28/2024	10:30 AM	Heather Adamson and Chris Duymich	Vibeke Norgaard and Anastazia Aziz (consultant)
City of Watsonville	5/29/2024	1:30 PM	Maura Twomey and Heather Adamson	Justin Meek
City of Capitola	5/29/2024	3:00 PM	Heather Adamson and Chris Duymich	Katie Herlihy and Brian Froelich
City of Scotts Valley	5/30/2024	10:30 AM	Heather Adamson and Chris Duymich	Taylor Bateman and Sarah Wikle
City of Santa Cruz	5/30/2024	3:00 PM	Maura Twomey, Heather Adamson, and Chris Duymich	Lee Butler, Matt VanHua, and Bonnie Lipscomb
County of Santa Cruz	6/3/2024	11:00 AM	Maura Twomey, Heather Adamson, and Chris Duymich	Stephanie Hansen, Mark Connolly, Matthew Sundt, Fernanda Dias Pini, and Jacob Lutz
City of Del Rey Oaks	6/4/2024	11:30 AM	Heather Adamson and Chris Duymich	John Guertin, Denise Duffy (consultant), and Troy Lawson (consultant)
City of San Juan Bautista	6/5/2024	9:00 AM	Heather Adamson and Chris Duymich	Don Reynolds
LAFCO San Benito County	6/5/2024	3:00 PM	Maura Twomey, Heather Adamson, and Chris Duymich	Jennifer Stephenson
City of Gonzales	6/7/2024	11:00 AM	Heather Adamson and Chris Duymich	Taven Kinison Brown
City of Hollister	6/7/2024	1:00 PM	Heather Adamson and Chris Duymich	Eva Kelly, Ambur Cameron, and Rod Powell
City of Salinas	6/10/2024	4:00 PM	Maura Twomey, Heather Adamson, and Chris Duymich	Lisa Brinton, Jonathan Moore, and Huston Pullen
CSUMB	6/11/2024	11:00 AM	Heather Adamson, Chris Duymich, and Beth Jarosz (consultant)	Julie Wyrick, Kyle Jordan, and Matthew McCluney

2026 Regional Growth Forecast - One-on-One Meetings (Round 3)

City of King	6/12/2024	2:30pm	Heather Adamson and Chris Duymich	Doreen Liberto and Maricruz Aguilar
City of Seaside	6/13/2024	9:30 AM	Heather Adamson and Chris Duymich	Andrew Myrick, Alexia Rapoport, and Beth Rocha
City of Carmel-By-The-Sea	6/13/2024	11:00 AM	Heather Adamson and Chris Duymich	Marnie Waffle
City of Monterey	6/13/2024	3:00 PM	Maura Twomey, Heather Adamson, Bhupendra Patel, Chris Duymich, and Beth Jarosz (consultant)	Hans Ulsar, Kim Cole, and Levi Hill
City of Greenfield	6/17/2024	9:30 AM	Maura Twomey, Heather Adamson, and Chris Duymich	Paul Mugan and Evelin Meza
City of Pacific Grove	6/17/2024	1:00 PM	Heather Adamson and Chris Duymich	Karen Vaughn and Alyssa Kroeger
UCSC	6/17/2024	2:30 PM	Heather Adamson, Chris Duymich, and Beth Jarosz (consultant)	Jolie Kerns and Oxo Slayer
City of Marina	6/18/2020	9:00 AM	Maura Twomey, Heather Adamson, and Chris Duymich	Guido Persicone and Layne Long
City of Soledad	6/18/2024	1:00 PM	Maura Twomey, Heather Adamson, and Chris Duymich	Megan Hunter, Kao Ndu Yang, Ariana Mora-Jacobo, and Beatriz Trujillo
County of Monterey	6/20/2024	10:00 AM	Maura Twomey, Heather Adamson, and Chris Duymich	Melanie Beretti and Darby Marshall
County of San Benito	6/20/2024	2:00 PM	Maura Twomey, Heather Adamson, and Chris Duymich	Abraham Prado, Arielle Goodspeed, Stephanie Reck, Henie Ring, and Mindy Sotelo
LAFCO Monterey County	6/25/2024	10:00 AM	Maura Twomey, Heather Adamson, and Chris Duymich	Kate McKenna, Darren McCain, and Jonathan Brinkmann
City of Carmel-By-The-Sea	6/25/2024	11:30 AM	Heather Adamson, Chris Duymich, and Beth Jarosz (consultant)	Marnie Waffle

2026 Regional Growth Forecast - One-on-One Meetings (Round 3)

City of Carmel-By-The-Sea	7/29/2024	10:00 AM	Heather Adamson, Chris Duymich, Gina Schmidt, and Beth Jarosz (consultant)	Marnie Waffle
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2026 Regional Growth Forecast - One-on-One Meetings (Round 4)

Agency	Meeting Date	Meeting Time	AMBAG Attendees	Other Attendees
City of Sand City	8/22/2024	3:00 PM	Heather Adamson and Chris Duymich	Vibeke Norgaard and Anastazia Aziz (consultant)
UCSC	9/3/2024	3:30 PM	Heather Adamson, Chris Duymich, and Beth Jarosz (consultant)	Jolie Kerns and Oxo Slayer
City of Greenfield	9/9/2024	2:00 PM	Maura Twomey, Heather Adamson, Chris Duymich, and Beth Jarosz (consultant)	Paul Mugan and Evelin Meza
County of San Benito	9/11/2024	2:00 PM	Maura Twomey, Heather Adamson, Chris Duymich, and Beth Jarosz (consultant)	Abraham Prado, Arielle Goodspeed, Stephanie Reck, Henie Ring, and Mindy Sotelo
City of Monterey	9/18/2024	10:00 AM	Maura Twomey, Heather Adamson, Bhupendra Patel, Gina Schmidt, Chris Duymich, and Beth Jarosz (consultant)	Hans Ulsar, Kim Cole, and Levi Hill

Attachment 2: Employment Inventory

There are numerous sources of jobs data, all of which have different methodologies and results. Because different data sources have different strengths and weaknesses, many MPOs "triangulate" across multiple sources to improve the accuracy of their inventory. AMBAG's process involves two primary sources and multiple supporting sources. AMBAG collected address-level inventories from EDD and InfoUSA (now DataAxle), used multiple sources to "ground truth" the data including the AMBAG land use inventory, aerial imagery, "street view," and web searches.³⁴ AMBAG's assessment of data quality across sources found that EDD had better public-sector employer records and InfoGroup/DataAxle had better private-sector employer records.

To develop the inventory, AMBAG started with InfoGroup data, brought in EDD employer records where records were missing from InfoGroup (using point location data), and cleaned the resulting dataset. Cleaning included the following steps: Removing any duplicates at the same address point; flagging and reviewing for correction any records where employment was inconsistent with underlying land use (i.e., not on commercial, industrial, airport, or institutional land), any records that were exact duplicates with old or outdated business names, any records where spatial point location fell within AMBAG region but location is outside of region (e.g., Alameda address); and removing any "self-employment" records with 5 or more employees.

This practice of leveraging the best available data across multiple sources is consistent with industry standard practices. In August 2024, the San Diego Association of Governments and PRB surveyed MPOs/Council of Governments (COG)s across California to identify their employment inventory practices. Among the 10 MPOs that responded as of August 29, 2024 (including the four largest MPOs in California), the survey found that six use EDD address-level data in combination with other sources (such as InfoGroup/DataAxle or Longitudinal Employer-Household Dynamics [LEHD]), one uses EDD address-level data plus Department of Defense database, two use InfoGroup/DataAxle alone, and one does not use address-level data.

AMBAG and PRB then compared the resulting inventory to other published sources including LEHD, Bureau of Labor Statistics, EDD, and Bureau of Economic Analysis (Table 12). It is important to note that while AMBAG needs to track all jobs in the region, three of the sources exclude certain jobs.

³⁴ The InfoUSA data are derived from dozens of sources including but not limited to postal records, white pages listings, new business registrations, utility connections, real estate data (deeds & assessments) and industry directories. The database is then verified and supplemented with regular phone surveys. InfoUSA database is used by many other regional Councils of Governments to conduct forecast work and is a reputable source of data.

Table 12: Comparison of Region Jobs by Source in 2021, Sorted by Estimate

Data Source	2021 Annual Average Employment	Note
Longitudinal Employer-Household Dynamics (LEHD)	158,118	Includes only “covered” employment
U.S. Bureau of Labor Statistics (BLS)	188,895	Includes only “covered” employment
California Employment Development Department (EDD)	190,800	Includes only “covered” employment
AMBAG	225,800	Includes all jobs
U.S. Bureau of Economic Analysis (BEA)	252,498	Includes all jobs

Note: "Covered" employment includes jobs that pay into the unemployment insurance system. It excludes self-employment, some religiously affiliated jobs, many "gig" workers, and many commission-based workers (such as realtors).

As illustrated in the table above, the result of AMBAG’s method is an employment inventory that is higher than LEHD, BLS, EDD, but lower than BEA. Given that LEHD, BLS, and EDD do not include all types of jobs (such as self-employment and commission-based work), The inventory is consistent with AMBAG’s need to reflect *all* jobs, not just "covered" employment. AMBAG’s estimate is not the lowest nor the highest.

Base Year Data and Re-Benchmarking

In 2015, AMBAG staff collected address-level employment data from EDD and InfoUSA. In many cases records matched in both databases, but in many cases there were differences between the two data sources—in industrial classification, number of jobs, address, or other characteristics. AMBAG staff conducted an extensive, record-by-record ground-truthing—determining which of the two records was accurate—to assemble a base-year employment database. Through this process, AMBAG also re-classified some records from one industry to another, to better match the trip generation rates. (This step is explained in more detail below).

The resulting base-year employment database has somewhat different industrial classifications and total employment compared with trend data (1990-2023) from EDD used for the region-level forecast. To reconcile the two, AMBAG and PRB re-benchmarked the historical series (1990-2023) to reflect the validated base-year employment levels and industrial classifications.

Agriculture

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

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

It is also important to note that the AMBAG estimate of agricultural jobs differs from estimates of the agricultural workforce (91,433 in 2016) described in "Farmworker Housing Study and Action Plan for Salinas Valley and Pajaro Valley." The reasons for this difference are both temporal and definitional. The industry estimates are annual-average estimates of jobs (a job is a paid position at a company) for 2015. The Farmworker Housing Study figures are 2016 estimates of all workers who were ever employed during the year, including those who worked part-time or part-year. If a company has high turnover or seasonal work, that company's number of workers (all year) would be higher than their average number of jobs. For example, if a company typically has 10 paid positions, but in peak season brings on another 10 for three months, the annual average number of jobs is 12.5 ($10 \times (9/12\text{months}) + 20 \times (3/12\text{months}) = 12.5/\text{month}$) but there were 20 unique workers at peak (original 10 plus additional 10).

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

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

Industry Employment Classification Explanations & Examples

AMBAG relies upon data from EDD and other statistical agencies (e.g. BLS) for information about employment in the AMBAG region. Information is reported using the NAICS. NAICS is a production-orientated conceptual framework that groups establishments into industries based on their primary business activity. Establishments using similar material inputs, capital, and labor are classified in the same industry. In California, NAICS codes are assigned by the Labor Market Information Division (LMID) at EDD and can be changed at the request of the employer.³⁵

Companies within NAICS industrial categories may have similar material inputs and labor demands, but they may have very different trip generation rates—which are important for transportation modeling and planning. For some industries, AMBAG aggregates the NAICS sectors into larger categories with similar travel demand patterns, and in other industries, the data are disaggregated to better reflect job functions and trip generation patterns. Table 13 shows the cross-reference between NAICS industries and AMBAG sectors.

Table 13: Cross-reference Between AMBAG Forecast Sectors and NAICS Industries

Acronym	Description	NAICS ID*	NAICS Description
AGR	Agriculture (field work)	11*	Agriculture, Forestry, Fishing and Hunting
MFG	Manufacturing (<i>incl. crop processing</i>)	11*	Agriculture, Forestry, Fishing and Hunting
		21	Mining, Quarrying, and Oil and Gas Extraction
		31-33	Manufacturing
TR_CON	Site-based Skilled Trade	22	Utilities
		23	Construction
		48-49	Transportation and Warehousing
		56	Administrative & Support & Waste Mgmt. & Remediation
		92*	Public Administration
WHL	Wholesale (<i>incl. agricultural wholesale</i>)	11*	Agriculture, Forestry, Fishing and Hunting
		42	Wholesale Trade
RET	Retail (<i>incl. farm stands</i>)	11*	Agriculture, Forestry, Fishing and Hunting
		44-45	Retail Trade

³⁵ California Employment Development Department, Labor Market Information Division website. Accessed on August 16, 2019 at <http://www.labormarketinfo.edd.ca.gov/LMID/NAICS.html>

FIRE	Financial and Professional Services	51	Information
		52	Finance and Insurance
		53	Real Estate and Rental and Leasing
		54	Professional, Scientific, and Technical Services
		55	Management of Companies and Enterprises
EDU	Education (incl. public schools)	61	Educational Services
		92*	Public Administration
HLT	Health Care and Social Assistance	62	Health Care and Social Assistance
SRV	Other Services	71	Arts, Entertainment, and Recreation
		72	Accommodation and Food Services
		81	Other Services (except Public Administration)
PUB	Public (excl. education and transport)	92*	Public Administration
SELF_EMPL	Self-employed		Self-Employed

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

Each category is described below.

Industry Sector Definitions

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

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

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

Important note: Within NAICS classifications, support activities for agricultural or animal production (e.g., harvesting contractors, farm labor contractors, crop packaging, warehousing) appear in manufacturing, transportation and warehousing, or wholesale. In addition, a comprehensive review of AMBAG region firms listed in the agriculture NAICS sector showed many support activities. AMBAG staff re-classified these to manufacturing, wholesale, or retail.

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

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

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

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

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

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

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

Wholesale

- Includes establishments engaged in **wholesaling** merchandise, typically without transformation, and rendering services related to the sale of merchandise. Wholesalers sell merchandise to other

businesses, normally operate from a warehouse or office, and do not advertise to the general public.

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

Retail

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

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

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

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

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

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

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

- establishments that provide customers with lodging **accommodation** and/or preparing meals, snacks, and beverages for immediate consumption (**food services**); and
- establishments engaged in providing **services** not specifically provided for elsewhere in the classification system. This includes establishments primarily engaged in activities such as equipment and machinery repairing, promoting religious activities, pet care services, etc.

Examples: Dance companies; museums; zoos; nature parks; hotels and motels; campgrounds; caterers; restaurants; general automotive repair; car washes; computer and office machine repair and maintenance; barber shops; nail salons; parking lots and garages; civic and social organizations; political organizations; and labor unions.

Education

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

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

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

Health Care (includes health care and social assistance)

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

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

Public (includes government, excl. public schools)

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

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

Self-Employed

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

Attachment 3: Selection of Forecasting Framework

In working with AMBAG to produce the 2026 RGF, PRB conducted an evaluation of several population forecasting methods, as well as a scan of industry practices across peer regional planning agencies. PRB and AMBAG presented three forecast methodologies for AMBAG Board consideration. Based on the strengths of the framework, the AMBAG Board selected Option 2 for the 2026 RGF.

Option 1: Employment-Driven Method

The first option was to continue using the employment-driven forecast modeling framework that AMBAG used for the prior three MTP/SCS cycles. The modeling framework includes the following components:

Employment: Employment growth by industry is driven by projected national and statewide trends for all industries in the region using a shift-share model.

Population: Employment growth trends influence population growth. The forecast of total population is based on historical trends in the ratio of population to employment in AMBAG region. Projections of demographic characteristics (i.e., population by age, sex, and race/ethnicity) rely on a proportional approach based on demographic projections from the California DOF.

Household Population and Households: Demographic factors (e.g., age, sex, race/ethnicity) and external factors (e.g., major group quarters facilities like colleges and universities, correctional facilities, etc.) influence the household population and household formation rates (i.e., the number of people per household).

Housing Units: Housing projections are driven by the household population projection, demographic characteristics of the household population (age, sex, race/ethnicity), household formation rates, and housing vacancy rates.

Advantages of this approach are that it would be consistent with prior AMBAG MTP/SCSs.

Disadvantages of this approach include a weak linkage (only one direction from jobs to population) between population and jobs forecast, and reliance upon DOF's forecast for demographic detail.

Option 2: Cohort Component Population Growth

The second option implements a cohort component model for the population forecast that uses birth, death, and migration information to predict future population. The modeling framework includes the following components:

Employment: Employment growth by industry is driven by projected national and statewide trends for all industries in the region using a shift-share model with input from the population model through the working-age population forecast.

Population: Fertility, mortality, and migration trends influence population growth. Employment forecast influences migration levels.

Household Population and Households: Same as Option 1.

Housing Units: Same as Option 1.

Advantages of this approach include that it is consistent current practice at other California regional planning agencies, allows closest linkages between model components, and produces detailed demographic characteristics without relying on a forecast update from DOF. Disadvantages of this approach are that it is slightly more labor-intensive than the other two options.

Prior testing by PRB (for the 2022 RGF) has shown this approach to produce similar results to Option 1.

Option 3: DOF Forecast

The third option is to use DOF's forecast for population characteristics. The modeling framework is illustrated in the figure below.

Employment: Employment growth by industry is driven by projected national and statewide trends for all industries in the region using a shift-share model with input from the population model through working-age population forecast.

Population: Use DOF forecast as published.

Household Population and Households: Same as Option 1.

Housing Units: Same as Option 1.

Advantages of this approach are that it saves consulting time. Disadvantages of this approach are that there would be no local input on population forecast, only a weak linkage (only one direction from population to jobs) between population and jobs forecast, and uncertainty about DOF forecast release dates. In addition, DOF's forecast for small counties, like San Benito, varies widely between releases.

Attachment 4: Group Quarters and Housing

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

Housing

A housing unit is any single-family residential structure (like a house or a manufactured home) or any distinct unit in a multi-unit building where the unit provides privacy for the occupants, and the unit has access to the outside, and occupants can come and go as they wish (not a custodial facility), and occupancy is independent of any institutional affiliation.³⁶ Common examples include single family detached units, condominiums, rowhomes, townhomes, apartments, and manufactured housing. The U.S. Census Bureau defines Housing Units as follows:

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

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

³⁶ Todd Graham. 2020. "Local Planning Handbook: Housing Unit vs. Group Quarters," accessed at <https://metro council.org/Handbook/Files/Resources/Fact-Sheet/LAND-USE/Housing-Unit-vs-Group-Quarter.aspx> on January 16, 2021.

purposes, such as a store or an office, or quarters used for the storage of business supplies or inventory, machinery, or agricultural products.³⁷

It is important to note that the housing definition does not change based on a unit's occupancy status, nor its availability for rent or sale (except for non-traditional dwellings such as boats, vans, and tents, as noted in the excerpt above). For practical purposes, in the RGF units are counted as part of the housing inventory regardless of occupancy or availability in the real estate market. Second homes, vacation rentals, and accessory dwelling units are all counted as housing.

Group Quarters

A group quarters facility is one that houses multiple, unrelated people, where occupants do not have privacy, or there is controlled access to entering/leaving, or it's a facility that houses only an institutional or service-receiving population.³⁸ Common examples include college dormitories, military barracks, assisted living facilities, jails/prisons, and emergency/crisis shelters. In the decennial census, group quarters counts also include the unsheltered population.

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

A Group Quarters (GQs) is a place where people live or stay in a group living arrangement that is owned or managed by an entity or organization providing housing and/or services for the residents. These services may include custodial or medical care, as well as other types of assistance, and residency is commonly restricted to those receiving these services. This is not a typical household-type living arrangement. People living in GQs usually are not related to each other. GQs include such places as college residence halls, residential treatment centers, skilled nursing facilities, group homes, military barracks, correctional facilities, workers' dormitories, and facilities for people experiencing homelessness. GQs are defined according to the housing and/or services provided to residents and are identified by Census GQ type codes.³⁹

³⁷ U.S. Census Bureau. "American Community Survey and Puerto Rico Community Survey 2019 Subject Definitions," (December 2020) accessed at https://www2.census.gov/programs-surveys/acs/tech_docs/subject_definitions/2019_ACSSubjectDefinitions.pdf on January 16, 2021.

³⁸ Todd Graham. 2020. "Local Planning Handbook: Housing Unit vs. Group Quarters," accessed at <https://metro council.org/Handbook/Files/Resources/Fact-Sheet/LAND-USE/Housing-Unit-vs-Group-Quarter.aspx> on January 16, 2021.

³⁹ U.S. Census Bureau. "American Community Survey and Puerto Rico Community Survey 2019 Subject Definitions," (December 2020) accessed at https://www2.census.gov/programs-surveys/acs/tech_docs/subject_definitions/2019_ACSSubjectDefinitions.pdf on January 16, 2021.

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

University Housing

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

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

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

Farmworker Housing

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

Attachment 5: Jurisdiction Growth Projections

FINAL DRAFT 2026 Regional Growth Forecast

September 20, 2024

Carmel-By-The-Sea

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Carmel-By-The-Sea	3,722	3,473	3,168	3,105	2,881	2,961	3,018	3,057	3,082	-86	-3%	-23	-1%
% change		-6.7%	-8.8%	-2.0%	-7.2%	2.8%	1.9%	1.3%	0.8%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Carmel-By-The-Sea	3,722	3,473	3,168	3,105	2,881	2,961	3,018	3,057	3,082	-86	-3%	-23	-1%
% change		-6.7%	-8.8%	-2.0%	-7.2%	2.8%	1.9%	1.3%	0.8%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Carmel-By-The-Sea	0	0	0	0	0	0	0	0	0	0	--	0	--
% change		--	--	--	--	--	--	--	--				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Carmel-By-The-Sea	3,417	3,227	3,056	3,067	3,135	3,232	3,300	3,344	3,374	318	10%	307	10%
% change		-5.6%	-5.3%	0.4%	2.2%	3.1%	2.1%	1.3%	0.9%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

September 20, 2024

Carmel-By-The-Sea

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Carmel-By-The-Sea	2,095	1,904	1,721	1,723	1,586	1,635	1,670	1,692	1,707	-14	-1%	-16	-1%
% change		-9.1%	-9.6%	0.1%	-8.0%	3.1%	2.1%	1.3%	0.9%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Carmel-By-The-Sea	38.7%	41.0%	43.7%	43.8%	49.4%	49.4%	49.4%	49.4%	49.4%	5.7	13%	5.6	13%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Carmel-By-The-Sea	1.78	1.82	1.84	1.80	1.82	1.81	1.81	1.81	1.81	-0.03	-2%	0.01	1%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Carmel-By-The-Sea													
Agriculture (field work)	n/a	15	16	17	17	17	17	17	17	1	6%	0	0%
Manufacturing	n/a	106	108	127	131	131	131	131	131	23	21%	4	3%
Site-based Skilled Trade	n/a	86	91	97	100	99	99	99	99	8	9%	2	2%
Wholesale	n/a	17	17	18	18	18	18	18	18	1	6%	0	0%
Retail	n/a	645	595	615	608	595	580	564	550	-45	-8%	-65	-11%
Financial & Prof. Serv.	n/a	715	736	771	781	787	791	791	791	55	7%	20	3%
Education	n/a	63	65	64	65	65	65	65	65	0	0%	1	2%
Health Care & Soc.	n/a	61	63	66	67	67	67	67	67	4	6%	1	2%
Other Services	n/a	1,524	1,325	1,621	1,705	1,741	1,773	1,803	1,833	508	38%	212	13%
Public	n/a	47	49	48	58	58	58	58	58	9	18%	10	21%
Self-employed	n/a	74	77	79	79	78	77	76	74	-3	-4%	-5	-6%
Carmel-By-The-Sea	n/a	3,353	3,142	3,523	3,629	3,656	3,676	3,689	3,703	561	18%	180	5%
% change			-6.3%	12.1%	3.0%	0.7%	0.5%	0.4%	0.4%				

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

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast**Del Rey Oaks**

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Del Rey Oaks	1,624	1,625	1,579	1,559	1,670	1,782	1,850	1,912	1,958	379	24%	399	26%
% change		0.1%	-2.8%	-1.3%	7.1%	6.7%	3.8%	3.4%	2.4%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Del Rey Oaks	1,624	1,625	1,579	1,559	1,670	1,782	1,850	1,912	1,958	379	24%	399	26%
% change		0.1%	-2.8%	-1.3%	7.1%	6.7%	3.8%	3.4%	2.4%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Del Rey Oaks	0	0	0	0	0	0	0	0	0	0	--	0	--
% change		--	--	--	--	--	--	--	--				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Del Rey Oaks	741	741	739	746	820	893	938	973	998	259	35%	252	34%
% change		0.0%	-0.3%	0.9%	9.9%	8.9%	5.0%	3.7%	2.6%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Del Rey Oaks

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Del Rey Oaks	701	701	699	705	767	832	874	906	929	230	33%	224	32%
% change		0.0%	-0.3%	0.9%	8.8%	8.5%	5.0%	3.7%	2.5%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Del Rey Oaks	5.4%	5.4%	5.4%	5.5%	6.5%	6.8%	6.8%	6.9%	6.9%	1.5	28%	1.4	25%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Del Rey Oaks	2.32	2.32	2.26	2.21	2.18	2.14	2.12	2.11	2.11	-0.15	-7%	-0.10	-5%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Del Rey Oaks													
Agriculture (field work)	n/a	7	7	8	8	8	8	8	8	1	14%	0	0%
Manufacturing	n/a	13	13	15	15	15	15	15	15	2	15%	0	0%
Site-based Skilled Trade	n/a	40	42	44	45	45	45	45	45	3	7%	1	2%
Wholesale	n/a	13	13	14	14	14	14	14	14	1	8%	0	0%
Retail	n/a	126	116	120	120	117	112	107	104	-12	-10%	-16	-13%
Financial & Prof. Serv.	n/a	150	154	161	162	162	162	162	162	8	5%	1	1%
Education	n/a	21	22	22	22	22	22	22	22	0	0%	0	0%
Health Care & Soc.	n/a	17	17	17	17	17	17	17	17	0	0%	0	0%
Other Services	n/a	264	229	280	301	310	315	320	325	96	42%	45	16%
Public	n/a	9	9	9	14	14	14	14	14	5	56%	5	56%
Self-employed	n/a	45	48	48	48	48	47	46	45	-3	-6%	-3	-6%
Del Rey Oaks	n/a	705	670	738	766	772	771	770	771	101	15%	33	4%
% change			-5.0%	10.1%	3.8%	0.8%	-0.1%	-0.1%	0.1%				

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

Data Sources:

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast**Gonzales**

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Gonzales	8,187	8,486	8,548	8,384	11,430	11,489	11,555	11,631	11,647	3,099	36%	3,263	39%
% change		3.7%	0.7%	-1.9%	36.3%	0.5%	0.6%	0.7%	0.1%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Gonzales	8,181	8,480	8,542	8,378	11,424	11,483	11,549	11,625	11,641	3,099	36%	3,263	39%
% change		3.7%	0.7%	-1.9%	36.4%	0.5%	0.6%	0.7%	0.1%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Gonzales	6	6	6	6	6	6	6	6	6	0	0%	0	0%
% change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Gonzales	1,989	2,037	2,088	2,091	3,105	3,188	3,244	3,277	3,293	1,205	58%	1,202	57%
% change		2.4%	2.5%	0.1%	48.5%	2.7%	1.8%	1.0%	0.5%				

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FINAL DRAFT 2026 Regional Growth Forecast

Gonzales

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Gonzales	1,906	1,968	2,042	2,045	2,989	3,061	3,115	3,146	3,162	1,120	55%	1,117	55%
% change		3.3%	3.8%	0.1%	46.2%	2.4%	1.8%	1.0%	0.5%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Gonzales	4.2%	3.4%	2.2%	2.2%	3.7%	4.0%	4.0%	4.0%	4.0%	1.8	82%	1.8	82%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Gonzales	4.29	4.31	4.18	4.10	3.82	3.75	3.71	3.70	3.68	-0.50	-12%	-0.42	-10%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Gonzales													
Agriculture (field work)	n/a	1,874	1,900	2,102	2,253	2,259	2,264	2,269	2,274	374	20%	172	8%
Manufacturing	n/a	267	272	320	328	328	328	328	328	56	21%	8	3%
Site-based Skilled Trade	n/a	1,434	1,518	1,617	1,662	1,668	1,701	1,717	1,732	214	14%	115	7%
Wholesale	n/a	1,240	1,244	1,355	1,427	1,429	1,434	1,439	1,444	200	16%	89	7%
Retail	n/a	186	172	178	177	172	167	162	157	-15	-9%	-21	-12%
Financial & Prof. Serv.	n/a	34	35	36	36	36	36	36	36	1	3%	0	0%
Education	n/a	208	217	216	220	225	230	235	240	23	11%	24	11%
Health Care & Soc.	n/a	141	145	151	158	163	168	173	178	33	23%	27	18%
Other Services	n/a	210	182	223	234	239	244	249	254	72	40%	31	14%
Public	n/a	114	119	116	122	127	127	127	127	8	7%	11	9%
Self-employed	n/a	56	60	60	60	59	58	57	56	-4	-7%	-4	-7%
Gonzales	n/a	5,764	5,864	6,374	6,677	6,705	6,757	6,792	6,826	962	16%	452	7%
% change			1.7%	8.7%	4.8%	0.4%	0.8%	0.5%	0.5%				

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

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FINAL DRAFT 2026 Regional Growth Forecast

Greenfield

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Greenfield	16,330	17,456	18,782	20,155	21,149	21,371	21,498	21,557	21,633	2,851	15%	1,478	7%
% change		6.9%	7.6%	7.3%	4.9%	1.0%	0.6%	0.3%	0.4%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Greenfield	16,301	17,427	18,751	20,124	20,366	20,584	20,710	20,767	20,842	2,091	11%	718	4%
% change		6.9%	7.6%	7.3%	1.2%	1.1%	0.6%	0.3%	0.4%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Greenfield	29	29	31	31	783	787	788	790	791	760	2452%	760	2452%
% change		0.0%	6.9%	0.0%	2425.8%	0.5%	0.1%	0.3%	0.1%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Greenfield	3,752	3,904	4,207	4,724	4,941	5,133	5,268	5,372	5,436	1,229	29%	712	15%
% change		4.1%	7.8%	12.3%	4.6%	3.9%	2.6%	2.0%	1.2%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Greenfield

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Greenfield	3,460	3,680	4,090	4,593	4,757	4,907	5,007	5,084	5,127	1,037	25%	534	12%
% change		6.4%	11.1%	12.3%	3.6%	3.2%	2.0%	1.5%	0.8%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Greenfield	7.8%	5.7%	2.8%	2.8%	3.7%	4.4%	5.0%	5.4%	5.7%	2.9	104%	2.9	105%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Greenfield	4.71	4.74	4.58	4.38	4.28	4.19	4.14	4.08	4.07	-0.51	-11%	-0.31	-7%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Greenfield													
Agriculture (field work)	n/a	5,419	5,493	5,985	6,411	6,411	6,411	6,411	6,411	918	17%	426	7%
Manufacturing	n/a	34	33	37	37	37	37	37	37	4	12%	0	0%
Site-based Skilled Trade	n/a	199	211	224	229	227	228	229	229	18	9%	5	2%
Wholesale	n/a	85	86	89	93	93	93	93	93	7	8%	4	4%
Retail	n/a	227	210	215	214	208	204	199	194	-16	-8%	-21	-10%
Financial & Prof. Serv.	n/a	141	145	147	148	148	148	148	148	3	2%	1	1%
Education	n/a	374	389	388	393	403	411	418	423	34	9%	35	9%
Health Care & Soc.	n/a	285	293	300	309	318	325	334	341	48	16%	41	14%
Other Services	n/a	257	224	269	289	299	309	321	330	106	47%	61	23%
Public	n/a	150	156	152	153	153	153	153	153	-3	-2%	1	1%
Self-employed	n/a	56	60	60	60	59	58	57	56	-4	-7%	-4	-7%
Greenfield	n/a	7,227	7,300	7,866	8,336	8,356	8,377	8,400	8,415	1,115	15%	549	7%
% change			1.0%	7.8%	6.0%	0.2%	0.3%	0.3%	0.2%				

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

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Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

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FINAL DRAFT 2026 Regional Growth Forecast

King City

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
King City	12,874	13,058	13,395	13,968	14,871	14,938	14,975	15,044	15,158	1,763	13%	1,190	9%
% change		1.4%	2.6%	4.3%	6.5%	0.5%	0.2%	0.5%	0.8%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
King City	12,815	12,989	13,124	13,697	13,787	13,852	13,888	13,956	14,069	945	7%	372	3%
% change		1.4%	1.0%	4.4%	0.7%	0.5%	0.3%	0.5%	0.8%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
King City	59	69	271	271	1,084	1,086	1,087	1,088	1,089	818	302%	818	302%
% change		16.9%	292.8%	0.0%	300.0%	0.2%	0.1%	0.1%	0.1%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
King City	3,218	3,298	3,465	3,691	3,870	3,990	4,065	4,140	4,219	754	22%	528	14%
% change		2.5%	5.1%	6.5%	4.8%	3.1%	1.9%	1.8%	1.9%				

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FINAL DRAFT 2026 Regional Growth Forecast**King City**

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
King City	3,008	3,101	3,282	3,496	3,630	3,727	3,796	3,866	3,940	658	20%	444	13%
% change		3.1%	5.8%	6.5%	3.8%	2.7%	1.9%	1.8%	1.9%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
King City	6.5%	6.0%	5.3%	5.3%	6.2%	6.6%	6.6%	6.6%	6.6%	1.3	25%	1.3	25%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
King City	4.26	4.19	4.00	3.92	3.80	3.72	3.66	3.61	3.57	-0.43	-11%	-0.35	-9%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
King City													
Agriculture (field work)	n/a	684	693	756	807	809	810	812	814	121	17%	58	8%
Manufacturing	n/a	265	271	309	317	317	317	317	317	46	17%	8	3%
Site-based Skilled Trade	n/a	474	502	529	542	539	544	548	553	51	10%	24	5%
Wholesale	n/a	1,514	1,519	1,624	1,679	1,681	1,686	1,691	1,696	177	12%	72	4%
Retail	n/a	1,023	943	959	947	926	905	882	857	-86	-9%	-102	-11%
Financial & Prof. Serv.	n/a	295	304	311	314	316	316	316	316	12	4%	5	2%
Education	n/a	573	597	596	609	624	637	647	657	60	10%	61	10%
Health Care & Soc.	n/a	1,632	1,676	1,743	1,835	1,898	1,954	2,003	2,047	371	22%	304	17%
Other Services	n/a	607	528	641	666	681	694	704	714	186	35%	73	11%
Public	n/a	443	462	452	459	462	467	472	477	15	3%	25	6%
Self-employed	n/a	63	67	67	67	67	66	64	63	-4	-6%	-4	-6%
King City	n/a	7,573	7,562	7,987	8,242	8,320	8,396	8,456	8,511	949	13%	524	7%
% change			-0.1%	5.6%	3.2%	0.9%	0.9%	0.7%	0.7%				

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

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FINAL DRAFT 2026 Regional Growth Forecast

Marina

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Marina (Total)	19,718	20,815	21,738	22,269	27,568	29,100	31,706	33,071	34,305	12,567	58%	12,036	54%
% change		5.6%	4.4%	2.4%	23.8%	5.6%	9.0%	4.3%	3.7%				
Marina balance	19,084	19,795	20,813	21,546	25,707	25,839	25,845	25,910	25,944				
CSUMB	634	1,020	925	723	1,861	3,261	5,861	7,161	8,361				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Marina (Total)	18,827	19,523	20,528	21,173	25,389	25,725	26,729	27,084	27,378	6,850	33%	6,205	29%
% change		3.7%	5.1%	3.1%	19.9%	1.3%	3.9%	1.3%	1.1%				
Marina balance	18,827	19,523	20,528	21,173	25,333	25,464	25,469	25,533	25,567				
CSUMB	0	0	0	0	56	261	1,260	1,551	1,811				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Marina (Total)	891	1,292	1,210	1,096	2,179	3,375	4,977	5,987	6,927	5,717	472%	5,831	532%
% change		45.0%	-6.3%	-9.4%	98.8%	54.9%	47.5%	20.3%	15.7%				
Marina balance	257	272	285	373	374	375	376	377	377				
CSUMB	634	1,020	925	723	1,805	3,000	4,601	5,610	6,550				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Marina (Total)	7,200	7,449	8,022	8,444	11,268	11,637	11,740	11,809	11,833	3,811	48%	3,389	40%
% change		3.5%	7.7%	5.3%	33.4%	3.3%	0.9%	0.6%	0.2%				
Marina balance	7,200	7,449	8,022	8,444	11,268	11,637	11,740	11,809	11,833				
CSUMB	0	0	0	0	0	0	0	0	0				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Marina

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Marina (Total)	6,845	7,056	7,608	8,009	10,320	10,597	10,688	10,750	10,772	3,164	42%	2,763	34%
% change		3.1%	7.8%	5.3%	28.9%	2.7%	0.9%	0.6%	0.2%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Marina	4.9%	5.3%	5.2%	5.2%	8.4%	8.9%	9.0%	9.0%	9.0%	3.8	74%	3.8	74%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Marina	2.75	2.77	2.70	2.64	2.46	2.43	2.50	2.52	2.54	-0.16	-6%	-0.10	-4%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Marina													
Agriculture (field work)	n/a	45	46	51	55	55	55	55	55	9	20%	4	8%
Manufacturing	n/a	94	96	113	120	122	125	127	130	34	35%	17	15%
Site-based Skilled Trade	n/a	1,002	1,061	1,130	1,178	1,169	1,180	1,191	1,201	140	13%	71	6%
Wholesale	n/a	196	197	215	229	231	234	236	239	42	21%	24	11%
Retail	n/a	1,063	980	1,013	1,001	980	958	937	914	-66	-7%	-99	-10%
Financial & Prof. Serv.	n/a	381	392	410	418	424	426	427	428	36	9%	18	4%
Education	n/a	390	406	404	409	419	429	440	448	42	10%	44	11%
Health Care & Soc.	n/a	566	581	606	646	679	709	737	762	181	31%	156	26%
Other Services	n/a	1,202	1,046	1,280	1,362	1,404	1,454	1,503	1,548	502	48%	268	21%
Public	n/a	827	862	845	864	874	884	894	904	42	5%	59	7%
Self-employed	n/a	341	363	363	363	360	355	348	341	-22	-6%	-22	-6%
Marina Total	n/a	6,107	6,030	6,430	6,645	6,717	6,809	6,895	6,970	940	16%	540	8%
% change			-1.3%	6.6%	3.3%	1.1%	1.4%	1.3%	1.1%				

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

Data Sources:

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FINAL DRAFT 2026 Regional Growth Forecast

Monterey

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Monterey (Total)	27,810	28,186	28,474	27,189	28,714	29,428	29,995	30,526	30,859	2,385	8%	3,670	13%
% change		1.4%	1.0%	-4.5%	5.6%	2.5%	1.9%	1.8%	1.1%				
Monterey balance	23,583	24,195	24,258	24,114	24,514	25,228	25,795	26,326	26,659				
Presidio & NASM	4,227	3,991	4,216	3,075	4,200	4,200	4,200	4,200	4,200				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Monterey (Total)	25,307	25,600	25,626	24,580	26,286	26,997	27,562	28,091	28,422	2,796	11%	3,842	16%
% change		1.2%	0.1%	-4.1%	6.9%	2.7%	2.1%	1.9%	1.2%				
Monterey balance	23,148	23,666	23,620	23,476	23,838	24,549	25,114	25,643	25,974				
Presidio & NASM	2,159	1,934	2,006	1,104	2,448	2,448	2,448	2,448	2,448				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Monterey (Total)	2,503	2,586	2,848	2,609	2,428	2,431	2,433	2,435	2,437	-411	-14%	-172	-7%
% change		3.3%	10.1%	-8.4%	-6.9%	0.1%	0.1%	0.1%	0.1%				
Monterey balance	435	529	638	638	676	679	681	683	685				
Presidio & NASM	2,068	2,057	2,210	1,971	1,752	1,752	1,752	1,752	1,752				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Monterey (Total)	13,584	13,677	13,787	13,825	15,542	16,204	16,680	17,110	17,406	3,619	26%	3,581	26%
% change		0.7%	0.8%	0.3%	12.4%	4.3%	2.9%	2.6%	1.7%				
Monterey balance	13,152	13,245	13,355	13,393	15,110	15,772	16,248	16,678	16,974				
Presidio & NASM	432	432	432	432	432	432	432	432	432				

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FINAL DRAFT 2026 Regional Growth Forecast

Monterey

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Monterey (Total)	12,184	12,175	12,399	12,545	13,909	14,400	14,817	15,198	15,460	3,061	25%	2,915	23%
% change		-0.1%	1.8%	1.2%	10.9%	3.5%	2.9%	2.6%	1.7%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Monterey	10.3%	11.0%	10.1%	9.3%	10.5%	11.1%	11.2%	11.2%	11.2%	1.1	11%	1.9	21%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Monterey	2.08	2.10	2.07	1.96	1.89	1.87	1.86	1.85	1.84	-0.23	-11%	-0.12	-6%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Monterey													
Agriculture (field work)	n/a	57	58	64	68	68	68	68	68	10	17%	4	6%
Manufacturing	n/a	1,004	1,024	1,202	1,230	1,228	1,223	1,218	1,218	194	19%	16	1%
Site-based Skilled Trade	n/a	2,758	2,919	3,108	3,221	3,203	3,240	3,270	3,300	381	13%	192	6%
Wholesale	n/a	740	743	809	851	851	854	859	864	121	16%	55	7%
Retail	n/a	4,080	3,762	3,886	3,766	3,668	3,563	3,460	3,357	-405	-11%	-529	-14%
Financial & Prof. Serv.	n/a	6,372	6,557	6,864	6,939	6,988	7,013	7,020	7,018	461	7%	154	2%
Education	n/a	3,082	3,209	3,201	3,257	3,332	3,400	3,462	3,521	312	10%	320	10%
Health Care & Soc.	n/a	5,835	5,991	6,264	6,582	6,809	7,014	7,194	7,352	1,361	23%	1,088	17%
Other Services	n/a	9,037	7,861	9,617	9,993	10,143	10,274	10,385	10,492	2,631	33%	875	9%
Public	n/a	1,886	1,966	1,929	1,968	1,989	2,009	2,029	2,049	83	4%	120	6%
Self-employed	n/a	782	832	832	832	826	813	798	782	-50	-6%	-50	-6%
Monterey Total	n/a	35,633	34,922	37,776	38,707	39,105	39,471	39,763	40,021	5,099	15%	2,245	6%
% change			-2.0%	8.2%	2.5%	1.0%	0.9%	0.7%	0.6%				

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

Data Sources:

Population and Housing 2010-2023 from California Department of Finance.

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FINAL DRAFT 2026 Regional Growth Forecast

Pacific Grove

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Pacific Grove	15,041	15,273	14,978	14,872	15,223	15,404	15,602	15,768	15,894	916	6%	1,022	7%
% change		1.5%	-1.9%	-0.7%	2.4%	1.2%	1.3%	1.1%	0.8%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Pacific Grove	14,686	14,903	14,596	14,490	14,840	15,021	15,218	15,383	15,509	913	6%	1,019	7%
% change		1.5%	-2.1%	-0.7%	2.4%	1.2%	1.3%	1.1%	0.8%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Pacific Grove	355	370	382	382	383	383	384	385	385	3	1%	3	1%
% change		4.2%	3.2%	0.0%	0.3%	0.0%	0.3%	0.3%	0.0%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Pacific Grove	8,169	8,144	8,121	8,232	8,559	8,804	9,025	9,153	9,234	1,113	14%	1,002	12%
% change		-0.3%	-0.3%	1.4%	4.0%	2.9%	2.5%	1.4%	0.9%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Pacific Grove

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Pacific Grove	7,020	6,914	6,772	6,862	7,135	7,339	7,523	7,630	7,698	926	14%	836	12%
% change		-1.5%	-2.1%	1.3%	4.0%	2.9%	2.5%	1.4%	0.9%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Pacific Grove	14.1%	15.1%	16.6%	16.6%	16.6%	16.6%	16.6%	16.6%	16.6%	0.0	0%	0.0	0%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Pacific Grove	2.09	2.16	2.16	2.11	2.08	2.05	2.02	2.02	2.01	-0.15	-7%	-0.10	-5%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Pacific Grove													
Agriculture (field work)	n/a	4	4	4	4	4	4	4	4	0	0%	0	0%
Manufacturing	n/a	75	76	83	83	83	83	83	83	7	9%	0	0%
Site-based Skilled Trade	n/a	294	312	326	330	327	329	332	337	25	8%	11	3%
Wholesale	n/a	90	89	92	96	96	96	96	96	7	8%	4	4%
Retail	n/a	681	628	640	633	618	603	587	573	-55	-9%	-67	-10%
Financial & Prof. Serv.	n/a	1,050	1,080	1,093	1,106	1,114	1,120	1,122	1,122	42	4%	29	3%
Education	n/a	443	461	460	466	476	486	496	506	45	10%	46	10%
Health Care & Soc.	n/a	451	463	479	492	498	502	506	506	43	9%	27	6%
Other Services	n/a	3,696	3,214	3,924	4,138	4,223	4,301	4,376	4,449	1,235	38%	525	13%
Public	n/a	353	368	360	367	372	377	382	387	19	5%	27	8%
Self-employed	n/a	333	354	354	354	352	346	340	333	-21	-6%	-21	-6%
Pacific Grove	n/a	7,470	7,049	7,815	8,069	8,163	8,247	8,324	8,396	1,347	19%	581	7%
% change			-5.6%	10.9%	3.3%	1.2%	1.0%	0.9%	0.9%				

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

Data Sources:

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast

Salinas

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Salinas	150,441	158,116	161,776	160,870	161,947	162,791	163,127	163,871	164,615	2,839	2%	3,745	2%
% change		5.1%	2.3%	-0.6%	0.7%	0.5%	0.2%	0.5%	0.5%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Salinas	147,976	155,705	159,397	158,478	159,551	160,392	160,724	161,464	162,206	2,809	2%	3,728	2%
% change		5.2%	2.4%	-0.6%	0.7%	0.5%	0.2%	0.5%	0.5%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Salinas	2,465	2,411	2,379	2,392	2,396	2,399	2,403	2,407	2,409	30	1%	17	1%
% change		-2.2%	-1.3%	0.5%	0.2%	0.1%	0.2%	0.2%	0.1%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Salinas	42,651	43,481	44,405	44,939	48,234	50,082	51,350	52,174	52,717	8,312	19%	7,778	17%
% change		1.9%	2.1%	1.2%	7.3%	3.8%	2.5%	1.6%	1.0%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast**Salinas**

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Salinas	40,387	41,698	43,163	43,670	45,781	47,384	48,576	49,355	49,868	6,705	16%	6,198	14%
% change		3.2%	3.5%	1.2%	4.8%	3.5%	2.5%	1.6%	1.0%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Salinas	5.3%	4.1%	2.8%	2.8%	5.1%	5.4%	5.4%	5.4%	5.4%	2.6	93%	2.6	92%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Salinas	3.66	3.73	3.69	3.63	3.49	3.38	3.31	3.27	3.25	-0.44	-12%	-0.38	-10%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Salinas													
Agriculture (field work)	n/a	7,502	7,607	8,485	9,014	9,017	9,021	9,023	9,025	1,418	19%	540	6%
Manufacturing	n/a	1,928	1,966	2,324	2,382	2,380	2,376	2,374	2,375	409	21%	51	2%
Site-based Skilled Trade	n/a	8,555	9,057	9,654	10,018	9,952	10,069	10,171	10,267	1,210	13%	613	6%
Wholesale	n/a	8,580	8,610	9,400	9,920	9,937	9,969	10,008	10,051	1,441	17%	651	7%
Retail	n/a	8,750	8,069	8,377	8,276	8,101	7,918	7,727	7,529	-540	-7%	-848	-10%
Financial & Prof. Serv.	n/a	6,025	6,202	6,554	6,635	6,691	6,723	6,740	6,745	543	9%	191	3%
Education	n/a	4,821	5,020	5,011	5,103	5,222	5,330	5,432	5,530	510	10%	519	10%
Health Care & Soc.	n/a	11,110	11,408	11,950	12,598	13,040	13,436	13,781	14,086	2,678	23%	2,136	18%
Other Services	n/a	7,766	6,756	8,278	8,788	9,025	9,243	9,467	9,686	2,930	43%	1,408	17%
Public	n/a	7,081	7,385	7,244	7,467	7,584	7,695	7,806	7,916	531	7%	672	9%
Self-employed	n/a	891	948	949	948	942	927	909	893	-55	-6%	-56	-6%
Salinas	n/a	73,009	73,028	78,226	81,149	81,891	82,707	83,438	84,103	11,075	15%	5,877	8%
% change			0.0%	7.1%	3.7%	0.9%	1.0%	0.9%	0.8%				

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

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast**Sand City**

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Sand City	334	350	368	378	1,025	1,068	1,092	1,113	1,121	753	205%	743	197%
% change		4.8%	5.1%	2.7%	171.2%	4.2%	2.2%	1.9%	0.7%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Sand City	291	307	368	378	1,025	1,068	1,092	1,113	1,121	753	205%	743	197%
% change		5.5%	19.9%	2.7%	171.2%	4.2%	2.2%	1.9%	0.7%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Sand City	43	43	0	0	0	0	0	0	0	0	--	0	--
% change		0.0%	-100.0%	--	--	--	--	--	--				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Sand City	145	176	186	197	553	585	605	618	623	437	235%	426	216%
% change		21.4%	5.7%	5.9%	180.7%	5.8%	3.4%	2.1%	0.8%				

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FINAL DRAFT 2026 Regional Growth Forecast

Sand City

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Sand City	128	144	163	172	475	503	521	533	537	374	229%	365	212%
% change		12.5%	13.2%	5.5%	176.2%	5.9%	3.6%	2.3%	0.8%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Sand City	11.7%	18.2%	12.4%	12.7%	14.1%	14.0%	13.9%	13.8%	13.8%	1.4	11%	1.1	9%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Sand City	2.27	2.13	2.26	2.20	2.16	2.12	2.10	2.09	2.09	-0.17	-8%	-0.11	-5%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Sand City													
Agriculture (field work)	n/a	0	0	0	0	0	0	0	0	0	--	0	--
Manufacturing	n/a	201	205	241	245	245	245	245	245	40	20%	4	2%
Site-based Skilled Trade	n/a	393	416	443	460	457	463	468	473	57	14%	30	7%
Wholesale	n/a	203	204	222	234	234	234	234	234	30	15%	12	5%
Retail	n/a	582	537	555	548	538	526	515	502	-35	-7%	-53	-10%
Financial & Prof. Serv.	n/a	106	109	114	114	114	114	114	114	5	5%	0	0%
Education	n/a	16	17	17	17	17	17	17	17	0	0%	0	0%
Health Care & Soc.	n/a	52	53	56	56	56	56	56	56	3	6%	0	0%
Other Services	n/a	346	301	368	420	430	440	455	464	163	54%	96	26%
Public	n/a	41	43	42	42	42	42	42	42	-1	-2%	0	0%
Self-employed	n/a	26	28	28	28	27	27	27	26	-2	-7%	-2	-7%
Sand City	n/a	1,966	1,913	2,086	2,164	2,160	2,164	2,173	2,173	260	14%	87	4%
% change			-2.7%	9.0%	3.7%	-0.2%	0.2%	0.4%	0.0%				

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

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

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FINAL DRAFT 2026 Regional Growth Forecast

Seaside

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Seaside (Total)	33,025	33,431	32,731	30,187	30,507	30,906	31,521	32,120	32,626	-105	0%	2,439	8%
% change		1.2%	-2.1%	-7.8%	1.1%	1.3%	2.0%	1.9%	1.6%				
Seaside balance	26,836	25,968	25,080	24,971	23,652	24,051	24,666	25,265	25,771				
Fort Ord	4,473	4,163	4,202	2,112	3,751	3,751	3,751	3,751	3,751				
CSUMB	1,716	3,300	3,449	3,104	3,104	3,104	3,104	3,104	3,104				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Seaside (Total)	31,898	32,061	30,924	28,417	28,748	29,146	29,760	30,358	30,864	-60	0%	2,447	9%
% change		0.5%	-3.5%	-8.1%	1.2%	1.4%	2.1%	2.0%	1.7%				
Seaside balance	26,685	25,757	24,805	24,690	23,382	23,780	24,394	24,992	25,498				
Fort Ord	4,473	4,163	4,202	2,112	3,751	3,751	3,751	3,751	3,751				
CSUMB	740	2,141	1,917	1,615	1,615	1,615	1,615	1,615	1,615				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Seaside (Total)	1,127	1,370	1,807	1,770	1,759	1,760	1,761	1,762	1,762	-45	-2%	-8	0%
% change		21.6%	31.9%	-2.0%	-0.6%	0.1%	0.1%	0.1%	0.0%				
Seaside balance	151	211	275	281	270	271	272	273	273				
Fort Ord	0	0	0	0	0	0	0	0	0				
CSUMB	976	1,159	1,532	1,489	1,489	1,489	1,489	1,489	1,489				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Seaside (Total)	10,872	10,853	10,801	10,847	11,080	11,415	11,776	12,051	12,261	1,460	14%	1,414	13%
% change		-0.2%	-0.5%	0.4%	2.1%	3.0%	3.2%	2.3%	1.7%				
Seaside balance	9,507	8,848	8,850	8,896	9,129	9,464	9,825	10,100	10,310				
Fort Ord	1,119	1,119	1,119	1,119	1,119	1,119	1,119	1,119	1,119				
CSUMB	246	886	832	832	832	832	832	832	832				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Seaside

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Seaside (Total)	10,093	10,089	10,149	10,442	10,472	10,757	11,098	11,359	11,561	1,412	14%	1,119	11%
% change		0.0%	0.6%	2.9%	0.3%	2.7%	3.2%	2.4%	1.8%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Seaside	7.2%	7.0%	6.0%	3.7%	5.5%	5.8%	5.8%	5.7%	5.7%	-0.3	-5%	2.0	54%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Seaside	3.16	3.18	3.05	2.72	2.75	2.71	2.68	2.67	2.67	-0.38	-12%	-0.05	-2%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Seaside													
Agriculture (field work)	n/a	0	0	0	0	0	0	0	0	0	--	0	--
Manufacturing	n/a	105	107	126	130	130	130	130	130	23	21%	4	3%
Site-based Skilled Trade	n/a	599	634	675	701	697	705	712	717	83	13%	42	6%
Wholesale	n/a	169	169	184	192	192	192	192	192	23	14%	8	4%
Retail	n/a	1,835	1,692	1,748	1,724	1,688	1,650	1,609	1,569	-123	-7%	-179	-10%
Financial & Prof. Serv.	n/a	403	415	435	439	443	443	443	443	28	7%	8	2%
Education	n/a	1,054	1,097	1,094	1,113	1,138	1,163	1,183	1,203	106	10%	109	10%
Health Care & Soc.	n/a	815	836	874	918	949	978	1,003	1,025	189	23%	151	17%
Other Services	n/a	1,822	1,585	1,939	2,039	2,080	2,120	2,155	2,190	605	38%	251	13%
Public	n/a	2,358	2,458	2,411	2,470	2,497	2,522	2,547	2,572	114	5%	161	7%
Self-employed	n/a	507	540	540	540	536	527	518	507	-33	-6%	-33	-6%
Seaside Total	n/a	9,667	9,533	10,026	10,266	10,350	10,430	10,492	10,548	1,015	11%	522	5%
% change			-1.4%	5.2%	2.4%	0.8%	0.8%	0.6%	0.5%				

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

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast

Soledad

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Soledad (Total)	25,738	25,777	27,550	26,462	26,061	26,174	26,176	25,754	25,292	-2,258	-8%	-1,170	-4%
% change		0.2%	6.9%	-3.9%	-1.5%	0.4%	0.0%	-1.6%	-1.8%				
Soledad balance	15,690	17,478	19,433	19,565	20,887	21,962	22,612	22,685	22,900				
SVSP & CTF	10,048	8,299	8,117	6,897	5,174	4,212	3,564	3,069	2,392				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Soledad (Total)	15,635	17,113	18,756	18,880	20,128	21,201	21,850	21,922	22,136	3,380	18%	3,256	17%
% change		9.5%	9.6%	0.7%	6.6%	5.3%	3.1%	0.3%	1.0%				
Soledad balance	15,635	17,113	18,756	18,880	20,128	21,201	21,850	21,922	22,136				
SVSP & CTF	0	0	0	0	0	0	0	0	0				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Soledad (Total)	10,103	8,664	8,794	7,582	5,933	4,973	4,326	3,832	3,156	-5,638	-64%	-4,426	-58%
% change		-14.2%	1.5%	-13.8%	-21.7%	-16.2%	-13.0%	-11.4%	-17.6%				
Soledad balance	55	365	677	685	759	761	762	763	764				
SVSP & CTF	10,048	8,299	8,117	6,897	5,174	4,212	3,564	3,069	2,392				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Soledad (Total)	3,876	4,117	4,524	4,633	5,183	5,663	6,064	6,146	6,210	1,686	37%	1,577	34%
% change		6.2%	9.9%	2.4%	11.9%	9.3%	7.1%	1.4%	1.0%				
Soledad balance	3,876	4,117	4,524	4,633	5,183	5,663	6,064	6,146	6,210				
SVSP & CTF	0	0	0	0	0	0	0	0	0				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Soledad

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Soledad (Total)	3,664	3,939	4,447	4,552	5,009	5,451	5,805	5,860	5,922	1,475	33%	1,370	30%
% change		7.5%	12.9%	2.4%	10.0%	8.8%	6.5%	0.9%	1.1%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Soledad	5.5%	4.3%	1.7%	1.7%	3.4%	3.7%	4.3%	4.7%	4.6%	2.9	170%	2.9	166%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Soledad	4.27	4.34	4.22	4.15	4.02	3.89	3.76	3.74	3.74	-0.48	-11%	-0.41	-10%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Soledad													
Agriculture (field work)	n/a	1,729	1,753	1,939	2,080	2,085	2,090	2,095	2,100	347	20%	161	8%
Manufacturing	n/a	293	299	352	360	360	360	360	360	61	20%	8	2%
Site-based Skilled Trade	n/a	1,638	1,734	1,846	1,913	1,902	1,924	1,942	1,961	227	13%	115	6%
Wholesale	n/a	219	219	239	251	251	251	251	251	32	15%	12	5%
Retail	n/a	297	274	282	277	272	267	261	255	-19	-7%	-27	-10%
Financial & Prof. Serv.	n/a	183	188	197	199	199	199	199	199	11	6%	2	1%
Education	n/a	517	539	537	543	556	566	576	586	47	9%	49	9%
Health Care & Soc.	n/a	584	599	627	662	685	705	723	738	139	23%	111	18%
Other Services	n/a	433	376	460	483	493	503	513	523	147	39%	63	14%
Public	n/a	2,498	2,605	2,555	2,582	2,581	2,576	2,571	2,569	-36	-1%	14	1%
Self-employed	n/a	141	150	150	150	149	147	144	141	-9	-6%	-9	-6%
Soledad Total	n/a	8,532	8,736	9,184	9,500	9,533	9,588	9,635	9,683	947	11%	499	5%
% change			2.4%	5.1%	3.4%	0.3%	0.6%	0.5%	0.5%				

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

Data Sources:

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

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FINAL DRAFT 2026 Regional Growth Forecast

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Unincorporated Monterey

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Unincorporated Monterey (Total)	100,213	103,841	105,948	104,555	103,811	103,919	102,537	102,683	103,089	-2,859	-3%	-1,466	-1%
% change		3.6%	2.0%	-1.3%	-0.7%	0.1%	-1.3%	0.1%	0.4%				
<i>Unincorporated Monterey balance</i>	<i>97,672</i>	<i>101,300</i>	<i>103,407</i>	<i>102,014</i>	<i>101,276</i>	<i>101,384</i>	<i>101,302</i>	<i>101,448</i>	<i>101,854</i>				
<i>CSUMB</i>	<i>2,541</i>	<i>2,541</i>	<i>2,541</i>	<i>2,541</i>	<i>2,535</i>	<i>2,535</i>	<i>1,235</i>	<i>1,235</i>	<i>1,235</i>				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Unincorporated Monterey (Total)	96,551	100,204	102,336	100,943	99,989	100,058	101,146	101,290	101,695	-641	-1%	752	1%
% change		3.8%	2.1%	-1.4%	-0.9%	0.1%	1.1%	0.1%	0.4%				
<i>Unincorporated Monterey balance</i>	<i>96,551</i>	<i>100,204</i>	<i>102,336</i>	<i>100,943</i>	<i>99,989</i>	<i>100,058</i>	<i>99,911</i>	<i>100,055</i>	<i>100,460</i>				
<i>CSUMB</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>1,235</i>	<i>1,235</i>	<i>1,235</i>				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Unincorporated Monterey (Total)	3,662	3,637	3,612	3,612	3,822	3,861	1,391	1,393	1,394	-2,218	-61%	-2,218	-61%
% change		-0.7%	-0.7%	0.0%	5.8%	1.0%	-64.0%	0.1%	0.1%				
<i>Unincorporated Monterey balance</i>	<i>1,121</i>	<i>1,096</i>	<i>1,071</i>	<i>1,071</i>	<i>1,287</i>	<i>1,326</i>	<i>1,391</i>	<i>1,393</i>	<i>1,394</i>				
<i>CSUMB</i>	<i>2,541</i>	<i>2,541</i>	<i>2,541</i>	<i>2,541</i>	<i>2,535</i>	<i>2,535</i>	<i>0</i>	<i>0</i>	<i>0</i>				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Unincorporated Monterey (Total)	38,296	38,948	40,230	40,529	41,136	41,962	42,681	42,796	43,001	2,771	7%	2,472	6%
% change		1.7%	3.3%	0.7%	1.5%	2.0%	1.7%	0.3%	0.5%				
<i>Unincorporated Monterey balance</i>	<i>38,296</i>	<i>38,948</i>	<i>40,230</i>	<i>40,529</i>	<i>41,136</i>	<i>41,962</i>	<i>42,281</i>	<i>42,396</i>	<i>42,601</i>				
<i>CSUMB</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>400</i>	<i>400</i>	<i>400</i>				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

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Unincorporated Monterey

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Unincorporated Monterey (Total)	33,408	34,028	35,254	35,502	35,631	36,235	36,906	37,008	37,185	1,931	5%	1,683	5%
% change		1.9%	3.6%	0.7%	0.4%	1.7%	1.9%	0.3%	0.5%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Unincorporated Monterey	12.8%	12.6%	12.4%	12.4%	13.4%	13.6%	13.5%	13.5%	13.5%	1.1	9%	1.1	9%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Unincorporated Monterey	2.89	2.94	2.90	2.84	2.81	2.76	2.74	2.74	2.73	-0.17	-6%	-0.11	-4%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Unincorporated Monterey													
Agriculture (field work)	n/a	10,802	10,953	12,144	13,141	13,233	13,323	13,413	13,503	2,550	23%	1,359	11%
Manufacturing	n/a	2,227	2,271	2,665	2,723	2,718	2,705	2,695	2,687	416	18%	22	1%
Site-based Skilled Trade	n/a	6,850	7,251	7,721	8,003	7,955	8,040	8,116	8,191	940	13%	470	6%
Wholesale	n/a	7,978	8,005	8,721	9,170	9,181	9,205	9,230	9,263	1,258	16%	542	6%
Retail	n/a	4,979	4,592	4,744	4,683	4,584	4,479	4,372	4,263	-329	-7%	-481	-10%
Financial & Prof. Serv.	n/a	4,390	4,517	4,727	4,781	4,817	4,837	4,845	4,846	329	7%	119	3%
Education	n/a	2,843	2,960	2,954	3,006	3,076	3,139	3,197	3,250	290	10%	296	10%
Health Care & Soc.	n/a	2,345	2,408	2,518	2,653	2,746	2,829	2,901	2,964	556	23%	446	18%
Other Services	n/a	9,374	8,154	9,976	10,491	10,694	10,887	11,067	11,239	3,085	38%	1,263	13%
Public	n/a	1,295	1,351	1,325	1,360	1,375	1,390	1,405	1,420	69	5%	95	7%
Self-employed	n/a	2,679	2,851	2,851	2,851	2,831	2,786	2,735	2,680	-171	-6%	-171	-6%
Unincorporated Monterey Total	n/a	55,762	55,313	60,346	62,862	63,210	63,620	63,976	64,306	8,993	16%	3,960	7%
% change			-0.8%	9.1%	4.2%	0.6%	0.6%	0.6%	0.5%				

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

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast**Hollister**

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Hollister	34,928	37,671	41,675	42,547	45,633	45,691	45,745	45,850	45,884	4,209	10%	3,337	8%
% change		7.9%	10.6%	2.1%	7.3%	0.1%	0.1%	0.2%	0.1%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Hollister	34,813	37,394	41,364	42,240	45,351	45,409	45,461	45,565	45,599	4,235	10%	3,359	8%
% change		7.4%	10.6%	2.1%	7.4%	0.1%	0.1%	0.2%	0.1%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Hollister	115	277	311	307	282	282	284	285	285	-26	-8%	-22	-7%
% change		140.9%	12.3%	-1.3%	-8.1%	0.0%	0.7%	0.4%	0.0%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Hollister	10,401	10,857	12,182	13,006	15,236	15,636	15,888	16,058	16,164	3,982	33%	3,158	24%
% change		4.4%	12.2%	6.8%	17.1%	2.6%	1.6%	1.1%	0.7%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast**Hollister**

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Hollister	9,860	10,461	11,904	12,709	14,645	14,992	15,232	15,395	15,496	3,592	30%	2,787	22%
% change		6.1%	13.8%	6.8%	15.2%	2.4%	1.6%	1.1%	0.7%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Hollister	5.2%	3.6%	2.3%	2.3%	3.9%	4.1%	4.1%	4.1%	4.1%	1.8	79%	1.8	79%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Hollister	3.53	3.57	3.47	3.32	3.10	3.03	2.98	2.96	2.94	-0.53	-15%	-0.38	-11%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Hollister													
Agriculture (field work)	n/a	209	212	235	252	252	252	252	252	40	19%	17	7%
Manufacturing	n/a	1,511	1,541	1,808	1,848	1,845	1,839	1,834	1,831	290	19%	23	1%
Site-based Skilled Trade	n/a	2,178	2,305	2,455	2,547	2,530	2,559	2,582	2,606	301	13%	151	6%
Wholesale	n/a	426	428	466	491	491	491	491	491	63	15%	25	5%
Retail	n/a	1,910	1,762	1,820	1,796	1,758	1,717	1,675	1,632	-130	-7%	-188	-10%
Financial & Prof. Serv.	n/a	1,107	1,140	1,193	1,207	1,216	1,223	1,225	1,226	86	8%	33	3%
Education	n/a	847	882	880	895	915	935	952	967	85	10%	87	10%
Health Care & Soc.	n/a	2,162	2,220	2,321	2,442	2,527	2,603	2,670	2,728	508	23%	407	18%
Other Services	n/a	1,955	1,701	2,082	2,191	2,236	2,278	2,318	2,356	655	39%	274	13%
Public	n/a	829	864	847	866	876	886	896	906	42	5%	59	7%
Self-employed	n/a	1,294	1,377	1,377	1,377	1,367	1,346	1,321	1,294	-83	-6%	-83	-6%
Hollister	n/a	14,428	14,432	15,484	15,912	16,013	16,129	16,216	16,289	1,857	13%	805	5%
% change			0.0%	7.3%	2.8%	0.6%	0.7%	0.5%	0.5%				

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

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FINAL DRAFT 2026 Regional Growth Forecast**San Juan Bautista**

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
San Juan Bautista	1,862	1,915	2,084	2,032	2,035	2,049	2,066	2,083	2,098	14	1%	66	3%
% change		2.8%	8.8%	-2.5%	0.1%	0.7%	0.8%	0.8%	0.7%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
San Juan Bautista	1,857	1,910	2,077	2,025	2,028	2,042	2,058	2,075	2,090	13	1%	65	3%
% change		2.9%	8.7%	-2.5%	0.1%	0.7%	0.8%	0.8%	0.7%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
San Juan Bautista	5	5	7	7	7	7	8	8	8	1	14%	1	14%
% change		0.0%	40.0%	0.0%	0.0%	0.0%	14.3%	0.0%	0.0%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
San Juan Bautista	745	790	903	909	926	955	973	984	992	89	10%	83	9%
% change		6.0%	14.3%	0.7%	1.9%	3.1%	1.9%	1.1%	0.8%				

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FINAL DRAFT 2026 Regional Growth Forecast**San Juan Bautista**

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
San Juan Bautista	681	702	795	811	820	839	855	865	872	77	10%	61	8%
% change		3.1%	13.2%	2.0%	1.1%	2.3%	1.9%	1.2%	0.8%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
San Juan Bautista	8.6%	11.1%	12.0%	10.8%	11.4%	12.1%	12.1%	12.1%	12.1%	0.1	1%	1.3	12%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
San Juan Bautista	2.73	2.72	2.61	2.50	2.47	2.43	2.41	2.40	2.40	-0.21	-8%	-0.10	-4%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
San Juan Bautista													
Agriculture (field work)	n/a	38	39	43	47	47	47	47	47	8	21%	4	9%
Manufacturing	n/a	14	15	17	17	17	17	17	17	2	13%	0	0%
Site-based Skilled Trade	n/a	23	24	26	26	26	26	26	26	2	8%	0	0%
Wholesale	n/a	6	6	6	6	6	6	6	6	0	0%	0	0%
Retail	n/a	38	35	37	37	37	37	37	37	2	6%	0	0%
Financial & Prof. Serv.	n/a	64	66	69	69	69	69	69	69	3	5%	0	0%
Education	n/a	60	62	61	61	61	61	61	61	-1	-2%	0	0%
Health Care & Soc.	n/a	13	13	13	18	23	25	26	28	15	115%	15	115%
Other Services	n/a	195	170	208	219	224	229	234	239	69	41%	31	15%
Public	n/a	29	31	31	31	31	31	31	31	0	0%	0	0%
Self-employed	n/a	35	37	37	37	37	36	36	35	-2	-5%	-2	-5%
San Juan Bautista	n/a	515	498	548	568	578	584	590	596	98	20%	48	9%
% change			-3.3%	10.0%	3.6%	1.8%	1.0%	1.0%	1.0%				

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

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FINAL DRAFT 2026 Regional Growth Forecast

September 20, 2024

Unincorporated San Benito

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Unincorporated San Benito	18,479	19,253	20,450	20,586	21,245	21,554	22,166	22,729	23,048	2,598	13%	2,462	12%
% change		4.2%	6.2%	0.7%	3.2%	1.5%	2.8%	2.5%	1.4%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Unincorporated San Benito	18,310	19,054	20,191	20,321	20,693	21,001	21,610	22,172	22,490	2,299	11%	2,169	11%
% change		4.1%	6.0%	0.6%	1.8%	1.5%	2.9%	2.6%	1.4%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Unincorporated San Benito	169	199	259	265	552	553	556	557	558	299	115%	293	111%
% change		17.8%	30.2%	2.3%	108.3%	0.2%	0.5%	0.2%	0.2%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Unincorporated San Benito	6,724	6,800	7,280	7,661	7,981	8,270	8,655	8,955	9,137	1,857	26%	1,476	19%
% change		1.1%	7.1%	5.2%	4.2%	3.6%	4.7%	3.5%	2.0%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Unincorporated San Benito

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Unincorporated San Benito	6,264	6,331	6,785	7,141	7,421	7,654	8,009	8,286	8,454	1,669	25%	1,313	18%
% change		1.1%	7.2%	5.2%	3.9%	3.1%	4.6%	3.5%	2.0%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Unincorporated San Benito	6.8%	6.9%	6.8%	6.8%	7.0%	7.4%	7.5%	7.5%	7.5%	0.7	10%	0.7	10%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Unincorporated San Benito	2.92	3.01	2.98	2.85	2.79	2.74	2.70	2.68	2.66	-0.32	-11%	-0.19	-7%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Unincorporated San Benito													
Agriculture (field work)	n/a	1,405	1,424	1,575	1,691	1,696	1,701	1,709	1,716	292	21%	141	9%
Manufacturing	n/a	895	913	1,071	1,094	1,092	1,087	1,082	1,082	169	19%	11	1%
Site-based Skilled Trade	n/a	830	878	934	968	961	973	982	992	114	13%	58	6%
Wholesale	n/a	593	595	648	681	681	681	682	687	92	15%	39	6%
Retail	n/a	279	257	265	260	255	250	245	240	-17	-7%	-25	-9%
Financial & Prof. Serv.	n/a	1,450	1,492	1,562	1,580	1,594	1,602	1,605	1,605	113	8%	43	3%
Education	n/a	215	224	223	227	232	237	242	247	23	10%	24	11%
Health Care & Soc.	n/a	98	100	105	112	117	122	127	132	32	32%	27	26%
Other Services	n/a	452	393	481	501	509	516	525	535	142	36%	54	11%
Public	n/a	210	219	216	224	225	225	225	225	6	3%	9	4%
Self-employed	n/a	261	278	278	278	276	271	266	261	-17	-6%	-17	-6%
Unincorporated San Benito	n/a	6,688	6,773	7,358	7,616	7,638	7,665	7,690	7,722	949	14%	364	5%
% change			1.3%	8.6%	3.5%	0.3%	0.4%	0.3%	0.4%				

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

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast**Capitola**

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Capitola	9,918	10,126	9,859	9,558	10,070	10,635	11,029	11,262	11,395	1,536	16%	1,837	19%
% change		2.1%	-2.6%	-3.1%	5.4%	5.6%	3.7%	2.1%	1.2%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Capitola	9,770	9,963	9,684	9,383	9,894	10,458	10,850	11,082	11,215	1,531	16%	1,832	20%
% change		2.0%	-2.8%	-3.1%	5.4%	5.7%	3.7%	2.1%	1.2%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Capitola	148	163	175	175	176	177	179	180	180	5	3%	5	3%
% change		10.1%	7.4%	0.0%	0.6%	0.6%	1.1%	0.6%	0.0%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Capitola	5,534	5,502	5,485	5,507	5,887	6,242	6,491	6,634	6,715	1,230	22%	1,208	22%
% change		-0.6%	-0.3%	0.4%	6.9%	6.0%	4.0%	2.2%	1.2%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Capitola

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Capitola	4,626	4,624	4,624	4,648	4,969	5,269	5,479	5,600	5,668	1,044	23%	1,020	22%
% change		0.0%	0.0%	0.5%	6.9%	6.0%	4.0%	2.2%	1.2%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Capitola	16.4%	16.0%	15.7%	15.6%	15.6%	15.6%	15.6%	15.6%	15.6%	-0.1	-1%	0.0	0%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Capitola	2.11	2.15	2.09	2.02	1.99	1.98	1.98	1.98	1.98	-0.11	-5%	-0.04	-2%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Capitola													
Agriculture (field work)	n/a	7	7	8	8	8	8	8	8	1	14%	0	0%
Manufacturing	n/a	469	479	563	576	576	575	575	575	96	20%	12	2%
Site-based Skilled Trade	n/a	770	815	868	900	895	906	914	923	108	13%	55	6%
Wholesale	n/a	98	99	108	112	112	112	112	112	13	13%	4	4%
Retail	n/a	3,410	3,145	3,249	3,257	3,190	3,121	3,048	2,971	-174	-6%	-278	-9%
Financial & Prof. Serv.	n/a	1,841	1,895	1,983	2,005	2,020	2,030	2,034	2,035	140	7%	52	3%
Education	n/a	334	348	347	352	362	368	373	378	30	9%	31	9%
Health Care & Soc.	n/a	1,571	1,613	1,686	1,773	1,835	1,890	1,938	1,981	368	23%	295	17%
Other Services	n/a	2,493	2,169	2,653	2,790	2,847	2,899	2,949	2,998	829	38%	345	13%
Public	n/a	298	311	305	313	318	323	328	333	22	7%	28	9%
Self-employed	n/a	375	399	399	399	396	390	383	375	-24	-6%	-24	-6%
Capitola	n/a	11,666	11,280	12,169	12,485	12,559	12,622	12,662	12,689	1,409	12%	520	4%
% change			-3.3%	7.9%	2.6%	0.6%	0.5%	0.3%	0.2%				

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

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Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast

Santa Cruz

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Santa Cruz (Total)	59,946	64,466	64,695	62,929	68,057	71,343	74,839	75,583	75,950	11,255	17%	13,021	21%
% change		7.5%	0.4%	-2.7%	8.1%	4.8%	4.9%	1.0%	0.5%				
<i>Santa Cruz balance</i>	<i>43,614</i>	<i>47,479</i>	<i>46,287</i>	<i>44,385</i>	<i>45,557</i>	<i>46,343</i>	<i>46,839</i>	<i>47,583</i>	<i>47,950</i>				
<i>UCSC</i>	<i>16,332</i>	<i>16,987</i>	<i>18,408</i>	<i>18,544</i>	<i>22,500</i>	<i>25,000</i>	<i>28,000</i>	<i>28,000</i>	<i>28,000</i>				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Santa Cruz (Total)	51,657	52,645	51,504	49,973	51,889	53,428	54,620	55,361	55,727	4,223	8%	5,754	12%
% change		1.9%	-2.2%	-3.0%	3.8%	3.0%	2.2%	1.4%	0.7%				
<i>Santa Cruz balance</i>	<i>41,551</i>	<i>44,414</i>	<i>42,131</i>	<i>40,676</i>	<i>41,528</i>	<i>42,313</i>	<i>42,808</i>	<i>43,549</i>	<i>43,915</i>				
<i>UCSC</i>	<i>10,106</i>	<i>8,231</i>	<i>9,373</i>	<i>9,297</i>	<i>10,361</i>	<i>11,115</i>	<i>11,812</i>	<i>11,812</i>	<i>11,812</i>				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Santa Cruz (Total)	8,289	11,821	13,191	12,956	16,168	17,915	20,219	20,222	20,223	7,032	53%	7,267	56%
% change		42.6%	11.6%	-1.8%	24.8%	10.8%	12.9%	0.0%	0.0%				
<i>Santa Cruz balance</i>	<i>2,063</i>	<i>3,065</i>	<i>4,156</i>	<i>3,709</i>	<i>4,029</i>	<i>4,030</i>	<i>4,031</i>	<i>4,034</i>	<i>4,035</i>				
<i>UCSC</i>	<i>6,226</i>	<i>8,756</i>	<i>9,035</i>	<i>9,247</i>	<i>12,139</i>	<i>13,885</i>	<i>16,188</i>	<i>16,188</i>	<i>16,188</i>				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Santa Cruz (Total)	23,316	23,545	24,014	24,415	26,441	27,499	28,295	28,918	29,267	5,253	22%	4,852	20%
% change		1.0%	2.0%	1.7%	8.3%	4.0%	2.9%	2.2%	1.2%				
<i>Santa Cruz balance</i>	<i>22,768</i>	<i>22,997</i>	<i>23,466</i>	<i>23,867</i>	<i>25,756</i>	<i>26,539</i>	<i>27,060</i>	<i>27,683</i>	<i>28,032</i>				
<i>UCSC</i>	<i>548</i>	<i>548</i>	<i>548</i>	<i>548</i>	<i>685</i>	<i>960</i>	<i>1,235</i>	<i>1,235</i>	<i>1,235</i>				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Santa Cruz

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Santa Cruz (Total)	21,657	21,611	21,731	22,093	23,642	24,438	25,163	25,715	26,044	4,313	20%	3,951	18%
% change		-0.2%	0.6%	1.7%	7.0%	3.4%	3.0%	2.2%	1.3%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Santa Cruz	7.1%	8.2%	9.5%	9.5%	10.6%	11.1%	11.1%	11.1%	11.0%	1.5	16%	1.5	16%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Santa Cruz	2.39	2.44	2.37	2.26	2.19	2.19	2.17	2.15	2.14	-0.23	-10%	-0.12	-5%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Santa Cruz													
Agriculture (field work)	n/a	121	122	135	143	143	143	143	143	21	17%	8	6%
Manufacturing	n/a	2,367	2,414	2,833	2,897	2,893	2,880	2,872	2,867	453	19%	34	1%
Site-based Skilled Trade	n/a	2,235	2,365	2,518	2,611	2,595	2,625	2,649	2,673	308	13%	155	6%
Wholesale	n/a	1,197	1,201	1,308	1,376	1,378	1,383	1,388	1,393	192	16%	85	6%
Retail	n/a	5,314	4,900	5,063	5,027	4,948	4,860	4,775	4,687	-213	-4%	-376	-7%
Financial & Prof. Serv.	n/a	4,305	4,430	4,636	4,690	4,726	4,749	4,761	4,762	332	7%	126	3%
Education	n/a	6,183	6,437	6,422	6,535	6,686	6,821	6,947	7,065	628	10%	643	10%
Health Care & Soc.	n/a	3,844	3,947	4,126	4,342	4,492	4,626	4,743	4,847	900	23%	721	17%
Other Services	n/a	7,541	6,560	8,025	8,442	8,609	8,767	8,907	9,046	2,486	38%	1,021	13%
Public	n/a	5,691	5,934	5,820	5,960	6,021	6,083	6,147	6,211	277	5%	391	7%
Self-employed	n/a	2,042	2,173	2,173	2,173	2,158	2,125	2,085	2,043	-130	-6%	-130	-6%
Santa Cruz Total	n/a	40,840	40,483	43,059	44,196	44,649	45,062	45,417	45,737	5,254	13%	2,678	6%
% change			-0.9%	6.4%	2.6%	1.0%	0.9%	0.8%	0.7%				

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

Data Sources:

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast**Scotts Valley**

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Scotts Valley	11,580	12,145	12,069	11,872	12,322	12,603	12,887	13,094	13,235	1,166	10%	1,363	11%
% change		4.9%	-0.6%	-1.6%	3.8%	2.3%	2.3%	1.6%	1.1%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Scotts Valley	11,308	11,963	11,974	11,777	12,226	12,505	12,788	12,994	13,135	1,161	10%	1,358	12%
% change		5.8%	0.1%	-1.6%	3.8%	2.3%	2.3%	1.6%	1.1%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Scotts Valley	272	182	95	95	96	98	99	100	100	5	5%	5	5%
% change		-33.1%	-47.8%	0.0%	1.1%	2.1%	1.0%	1.0%	0.0%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Scotts Valley	4,610	4,781	4,934	4,994	5,400	5,643	5,844	5,988	6,088	1,154	23%	1,094	22%
% change		3.7%	3.2%	1.2%	8.1%	4.5%	3.6%	2.5%	1.7%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast**Scotts Valley**

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Scotts Valley	4,426	4,565	4,690	4,746	5,094	5,300	5,484	5,619	5,713	1,023	22%	967	20%
% change		3.1%	2.7%	1.2%	7.3%	4.0%	3.5%	2.5%	1.7%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Scotts Valley	4.0%	4.5%	4.9%	5.0%	5.7%	6.1%	6.2%	6.2%	6.2%	1.3	26%	1.2	24%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Scotts Valley	2.55	2.62	2.55	2.48	2.40	2.36	2.33	2.31	2.30	-0.25	-10%	-0.18	-7%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Scotts Valley													
Agriculture (field work)	n/a	5	6	7	7	7	7	7	7	1	17%	0	0%
Manufacturing	n/a	1,903	1,941	2,278	2,333	2,330	2,322	2,315	2,311	370	19%	33	1%
Site-based Skilled Trade	n/a	522	553	589	610	607	614	619	624	71	13%	35	6%
Wholesale	n/a	675	678	738	775	775	775	780	785	107	16%	47	6%
Retail	n/a	1,523	1,404	1,450	1,432	1,402	1,370	1,338	1,304	-100	-7%	-146	-10%
Financial & Prof. Serv.	n/a	1,583	1,629	1,705	1,721	1,733	1,737	1,737	1,737	108	7%	32	2%
Education	n/a	384	400	398	403	413	423	433	439	39	10%	41	10%
Health Care & Soc.	n/a	530	544	568	597	617	637	652	667	123	23%	99	17%
Other Services	n/a	1,720	1,496	1,830	1,918	1,948	1,973	1,998	2,021	525	35%	191	10%
Public	n/a	224	233	229	237	241	241	241	241	8	3%	12	5%
Self-employed	n/a	389	414	414	414	411	405	397	389	-25	-6%	-25	-6%
Scotts Valley	n/a	9,458	9,298	10,206	10,447	10,484	10,504	10,517	10,525	1,227	13%	319	3%
% change			-1.7%	9.8%	2.4%	0.4%	0.2%	0.1%	0.1%				

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

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast**Watsonville**

September 20, 2024

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Watsonville	51,199	52,689	51,809	50,820	51,475	51,835	52,005	52,180	52,251	442	1%	1,431	3%
% change		2.9%	-1.7%	-1.9%	1.3%	0.7%	0.3%	0.3%	0.1%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Watsonville	50,671	52,111	51,184	50,195	50,849	51,207	51,375	51,549	51,619	435	1%	1,424	3%
% change		2.8%	-1.8%	-1.9%	1.3%	0.7%	0.3%	0.3%	0.1%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Watsonville	528	578	625	625	626	628	630	631	632	7	1%	7	1%
% change		9.5%	8.1%	0.0%	0.2%	0.3%	0.3%	0.2%	0.2%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Watsonville	14,089	14,311	14,585	14,699	15,524	16,000	16,331	16,523	16,642	2,057	14%	1,943	13%
% change		1.6%	1.9%	0.8%	5.6%	3.1%	2.1%	1.2%	0.7%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast

Watsonville

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Watsonville	13,528	13,844	14,239	14,350	15,029	15,458	15,770	15,956	16,070	1,831	13%	1,720	12%
% change		2.3%	2.9%	0.8%	4.7%	2.9%	2.0%	1.2%	0.7%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Watsonville	4.0%	3.3%	2.4%	2.4%	3.2%	3.4%	3.4%	3.4%	3.4%	1.0	42%	1.0	42%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Watsonville	3.75	3.76	3.59	3.50	3.38	3.31	3.26	3.23	3.21	-0.38	-11%	-0.29	-8%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Watsonville													
Agriculture (field work)	n/a	3,828	3,882	4,224	4,502	4,517	4,532	4,547	4,562	680	18%	338	8%
Manufacturing	n/a	1,492	1,522	1,660	1,696	1,697	1,696	1,693	1,694	172	11%	34	2%
Site-based Skilled Trade	n/a	4,310	4,562	4,837	4,993	4,961	5,017	5,063	5,109	547	12%	272	6%
Wholesale	n/a	2,638	2,646	2,864	2,981	2,986	2,996	3,006	3,016	370	14%	152	5%
Retail	n/a	3,149	2,903	2,966	2,929	2,867	2,801	2,733	2,663	-240	-8%	-303	-10%
Financial & Prof. Serv.	n/a	2,064	2,124	2,158	2,181	2,198	2,207	2,212	2,212	88	4%	54	3%
Education	n/a	1,532	1,595	1,591	1,616	1,652	1,682	1,711	1,741	146	9%	150	9%
Health Care & Soc.	n/a	3,267	3,354	3,486	3,669	3,796	3,910	4,009	4,097	743	22%	611	18%
Other Services	n/a	2,578	2,243	2,739	2,873	2,932	2,986	3,034	3,082	839	37%	343	13%
Public	n/a	1,011	1,054	1,032	1,053	1,064	1,074	1,084	1,094	40	4%	62	6%
Self-employed	n/a	534	568	568	568	564	555	545	534	-34	-6%	-34	-6%
Watsonville	n/a	26,403	26,453	28,125	29,061	29,234	29,456	29,637	29,804	3,351	13%	1,679	6%
% change			0.2%	6.3%	3.3%	0.6%	0.8%	0.6%	0.6%				

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

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Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast

September 20, 2024

Unincorporated Santa Cruz

POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
Unincorporated Santa Cruz	129,739	134,781	132,429	128,159	126,990	127,679	127,747	128,139	128,568	-3,861	-3%	409	0%
% change		3.9%	-1.7%	-3.2%	-0.9%	0.5%	0.1%	0.3%	0.3%				

HOUSEHOLD POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
Unincorporated Santa Cruz	128,007	132,709	130,135	125,897	124,389	124,851	124,917	125,305	125,733	-4,402	-3%	-164	0%
% change		3.7%	-1.9%	-3.3%	-1.2%	0.4%	0.1%	0.3%	0.3%				

GROUP QUARTERS POPULATION										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
Unincorporated Santa Cruz	1,732	2,072	2,294	2,262	2,601	2,828	2,830	2,834	2,835	541	24%	573	25%
% change		19.6%	10.7%	-1.4%	15.0%	8.7%	0.1%	0.1%	0.0%				

HOUSING										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
Unincorporated Santa Cruz	56,927	57,152	57,327	57,550	58,568	60,005	60,609	61,061	61,380	4,053	7%	3,830	7%
% change		0.4%	0.3%	0.4%	1.8%	2.5%	1.0%	0.7%	0.5%				

*Note: Data for 2010 and 2020 are based on the 2010 Census and 2020 Census conducted by the U.S. Census Bureau. In some cases, operational challenges with the 2020 Census affected the accuracy of the count. Use caution when comparing change between these two years.

FINAL DRAFT 2026 Regional Growth Forecast**Unincorporated Santa Cruz**

September 20, 2024

HOUSEHOLDS										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	236,059	240,267	247,534	251,984	265,258	272,980	279,101	282,930	285,569	38,035	15%	33,585	13%
% change		1.8%	3.0%	1.8%	5.3%	2.9%	2.2%	1.4%	0.9%				
Unincorporated Santa Cruz	50,118	50,732	50,977	51,170	51,177	52,202	52,713	53,107	53,384	2,407	5%	2,214	4%
% change		1.2%	0.5%	0.4%	0.0%	2.0%	1.0%	0.7%	0.5%				
GROSS VACANCY RATE (incl. for sale, for rent, for seasonal/vacation, and other vacant units)										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	9.3%	8.9%	8.4%	8.3%	9.6%	9.9%	9.9%	9.9%	9.9%	1.5	18%	1.6	19%
Unincorporated Santa Cruz	12.0%	11.2%	11.1%	11.1%	12.6%	13.0%	13.0%	13.0%	13.0%	1.9	17%	1.9	17%
AVERAGE HOUSEHOLD SIZE										Chg.2020-50		Chg.2023-50	
	2010*	2015	2020*	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	2.97	3.03	2.97	2.88	2.80	2.75	2.72	2.70	2.69	-0.28	-9%	-0.19	-7%
Unincorporated Santa Cruz	2.55	2.62	2.55	2.46	2.43	2.39	2.37	2.36	2.36	-0.19	-7%	-0.10	-4%
JOBS										Chg.2020-50		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	349,335	374,835	372,030	400,859	414,479	417,694	421,002	423,808	426,335	54,305	15%	25,476	6%
% change		7.3%	-0.7%	7.7%	3.4%	0.8%	0.8%	0.7%	0.6%				
Unincorporated Santa Cruz													
Agriculture (field work)	n/a	2,836	2,876	3,268	3,536	3,546	3,556	3,566	3,576	700	24%	308	9%
Manufacturing	n/a	2,393	2,441	2,991	3,059	3,048	3,026	3,008	2,993	552	23%	2	0%
Site-based Skilled Trade	n/a	2,926	3,097	3,318	3,465	3,444	3,480	3,515	3,550	453	15%	232	7%
Wholesale	n/a	3,876	3,890	4,278	4,538	4,546	4,562	4,580	4,600	710	18%	322	8%
Retail	n/a	3,164	2,918	3,037	2,990	2,917	2,839	2,760	2,681	-237	-8%	-356	-12%
Financial & Prof. Serv.	n/a	3,329	3,426	3,637	3,683	3,711	3,726	3,733	3,733	307	9%	96	3%
Education	n/a	3,165	3,296	3,292	3,353	3,432	3,502	3,568	3,629	333	10%	337	10%
Health Care & Soc.	n/a	5,740	5,893	6,184	6,510	6,734	6,936	7,112	7,269	1,376	23%	1,085	18%
Other Services	n/a	8,403	7,310	8,955	9,432	9,624	9,803	9,972	10,135	2,825	39%	1,180	13%
Public	n/a	1,586	1,654	1,623	1,665	1,684	1,699	1,714	1,729	75	5%	106	7%
Self-employed	n/a	4,651	4,950	4,950	4,951	4,915	4,838	4,748	4,652	-298	-6%	-298	-6%
Unincorporated Santa Cruz	n/a	42,069	41,751	45,533	47,182	47,601	47,967	48,276	48,547	6,796	16%	3,014	7%
% change			-0.8%	9.1%	3.6%	0.9%	0.8%	0.6%	0.6%				

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

Population and Housing 2010-2023 from California Department of Finance.

Employment 2010-2023 from AMBAG based on California Employment Development Dept. and InfoUSA.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

FINAL DRAFT 2026 Regional Growth Forecast

California State University, Monterey Bay

POPULATION (Population data are FTE)

	Historical				Forecast (may be on or off campus)					Chg.2020-2050		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
CSUMB Total	4,891	6,861	6,915	6,368	7,500	8,900	10,200	11,500	12,700	5,785	84%	6,332	99%
Marina portion	634	1,020	925	723	1,861	3,261	5,861	7,161	8,361	7,436	804%	7,638	1056%
Seaside portion	1,716	3,300	3,449	3,104	3,104	3,104	3,104	3,104	3,104	-345	-10%	0	0%
Unincorporated	2,541	2,541	2,541	2,541	2,535	2,535	1,235	1,235	1,235	-1,306	-51%	-1,306	-51%
% change		40.3%	0.8%	-7.9%	17.8%	18.7%	14.6%	12.7%	10.4%				

GROUP QUARTERS POPULATION (Population living in dorms or similar group housing.)

	Historical				Forecast (may be on or off campus)					Chg.2020-2050		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
CSUMB Total	4,151	4,720	4,998	4,753	5,829	7,024	6,090	7,099	8,039	3,041	61%	3,286	69%
Marina portion	634	1,020	925	723	1,805	3,000	4,601	5,610	6,550	5,625	608%	5,827	806%
Seaside portion	976	1,159	1,532	1,489	1,489	1,489	1,489	1,489	1,489	-43	-3%	0	0%
Unincorporated	2,541	2,541	2,541	2,541	2,535	2,535	0	0	0	-2,541	-100%	-2,541	-100%
% change		13.7%	5.9%	-4.9%	22.6%	20.5%	-13.3%	16.6%	13.2%				

HOUSEHOLD POPULATION (FTE minus group quarters.)

	Historical				Forecast (may be on or off campus)					Chg.2020-2050		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
CSUMB Total	740	2,141	1,917	1,615	1,671	1,876	4,110	4,401	4,661	2,744	143%	3,046	189%
Marina portion	0	0	0	0	56	261	1,260	1,551	1,811	1,811	--	1,811	--
Seaside portion	740	2,141	1,917	1,615	1,615	1,615	1,615	1,615	1,615	-302	-16%	0	0%
Unincorporated	0	0	0	0	0	0	1,235	1,235	1,235	1,235	--	1,235	--
% change		189.3%	-10.5%	-15.8%	3.5%	12.3%	119.1%	7.1%	5.9%				

HOUSING (Units on campus, may include graduate student, staff, or faculty housing. Excludes group quarters beds.)

	Historical				Forecast (may be on or off campus)					Chg.2020-2050		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
CSUMB Total	246	886	832	832	832	832	1,232	1,232	1,232	400	48%	400	48%
Marina portion	0	0	0	0	0	0	0	0	0	0	--	0	--
Seaside portion	246	886	832	832	832	832	832	832	832	0	0%	0	0%
Unincorporated	0	0	0	0	0	0	400	400	400	400	--	400	--
% change		260.2%	-6.1%	0.0%	0.0%	0.0%	48.1%	0.0%	0.0%				

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

Data Sources:

Institutional Assessment and Research, Fall FTE by academic year (i.e., Fall 2019 is reflected as the 2019-2020 year)

Population and Housing 2010-2023 from California Department of Finance.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

September 20, 2024

FINAL DRAFT 2026 Regional Growth Forecast

University of California, Santa Cruz

POPULATION (Population data are FTE)

	Historical				Forecast (may be on or off campus)					Chg.2020-2050		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	732,708	762,933	774,105	762,456	784,684	794,720	803,136	809,027	813,708	39,603	5%	51,252	7%
% change		4.1%	1.5%	-1.5%	2.9%	1.3%	1.1%	0.7%	0.6%				
UCSC	16,332	16,987	18,408	18,544	22,500	25,000	28,000	28,000	28,000	9,592	52%	9,456	51%
% change		4.0%	8.4%	0.7%	21.3%	11.1%	12.0%	0.0%	0.0%				

GROUP QUARTERS POPULATION (Population living in dorms or similar group housing.)

	Historical				Forecast (may be on or off campus)					Chg.2020-2050		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	32,501	35,774	38,297	36,443	41,281	43,549	44,361	44,902	45,177	6,880	18%	8,734	24%
% change		10.1%	7.1%	-4.8%	13.3%	5.5%	1.9%	1.2%	0.6%				
UCSC	6,226	8,756	9,035	9,247	12,139	13,885	16,188	16,188	16,188	7,153	79%	6,941	75%
% change		40.6%	3.2%	2.3%	31.3%	14.4%	16.6%	0.0%	0.0%				

HOUSEHOLD POPULATION (FTE minus group quarters.)

	Historical				Forecast (may be on or off campus)					Chg.2020-2050		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	700,207	727,159	735,808	726,013	743,403	751,171	758,775	764,125	768,531	32,723	4%	42,518	6%
% change		3.8%	1.2%	-1.3%	2.4%	1.0%	1.0%	0.7%	0.6%				
UCSC	10,106	8,231	9,373	9,297	10,361	11,115	11,812	11,812	11,812	2,439	26%	2,515	27%
% change		-18.6%	13.9%	-0.8%	11.4%	7.3%	6.3%	0.0%	0.0%				

HOUSING (Units on campus, may include graduate student, staff, or faculty housing. Excludes group quarters beds.)

	Historical				Forecast (may be on or off campus)					Chg.2020-2050		Chg.2023-50	
	2010	2015	2020	2023	2030	2035	2040	2045	2050	Num.	%	Num.	%
AMBAG Region	260,256	263,790	270,341	274,706	293,389	303,038	309,822	314,084	316,990	46,649	17%	42,284	15%
% change		1.4%	2.5%	1.6%	6.8%	3.3%	2.2%	1.4%	0.9%				
UCSC	548	548	548	548	685	960	1,235	1,235	1,235	687	125%	687	125%
% change		--	--	0.0%	25.0%	40.1%	28.6%	0.0%	0.0%				

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

Data Sources:

Institutional Research, Analytics, and Planning Support (IRAPS), 3 Quarter Average, Total on Campus.

Population and Housing 2010-2023 from California Department of Finance.

All projections from Final Draft 2026 Regional Growth Forecast, produced by AMBAG and PRB

September 20, 2024