

January 2021

## New Population Estimates and Implications

In December 2020 the California Department of Finance (DOF) released new population estimates for counties as of July 1, 2020 and revisions to recent year estimates. These estimates will be replaced in the coming months by 2020 Census estimates where there are unknown issues with potential undercounts and the inclusion of all unauthorized immigrants.

The July 1, 2020 estimates show a pattern of sharply slowing population growth throughout California. The county composition of these regions is shown below in this report. The Bay Area, Sacramento region, L.A. Basin and San Diego regions correspond to the ABAG, SACOG, SCAG and SANDAG regional planning agency areas. All estimates in this report are for July 1 from DOF.

Population on July 1 (Thousands)

Regions	2015	2019	2020	2015-20	2019-20
<b>Bay Area</b>	7,634.2	7,786.2	7,787.9	2.0%	0.0%
<b>Sacramento</b>	2,427.0	2,533.8	2,553.7	5.2%	0.8%
<b>San Joaquin Valley</b>	4,160.5	4,320.8	4,350.4	4.6%	0.7%
<b>Los Angeles Basin</b>	18,789.3	19,044.0	19,025.4	1.3%	-0.1%
<b>San Diego</b>	3,275.0	3,346.9	3,352.1	2.4%	0.2%
<b>Rest of State</b>	2,791.1	2,799.8	2,782.6	-0.3%	-0.6%
<b>Mountain</b>	473.3	471.2	468.9	-0.9%	-0.5%
<b>Sacramento Valley</b>	515.8	508.4	500.9	-2.9%	-1.5%
<b>North Coast</b>	<b>314.2</b>	313.2	311.2	-1.0%	-0.7%
<b>Coast</b>	1,487.8	1,507.0	1,501.6	0.9%	-0.4%
<b>California</b>	39,007.1	39,761.2	39,782.4	2.0%	0.1%

The state added fewer than 1 million residents between 2015 and 2020 (+2.0%) and had virtually no growth in the latest year.

Highlights from these estimates include:

- All regions had falling levels of births and rising levels of deaths.

- All regions had falling levels of immigration.
- Sacramento was the only region that had positive net migration for each year between 2015 and 2020.
- The largest levels of domestic outmigration were in the Coastal regions with high and rising housing costs.
- The rest of state region (28 counties) lost population between 2015 and 2020 and had rising out migration from the high housing cost coastal counties of Monterey, Santa Barbara and Santa Cruz.

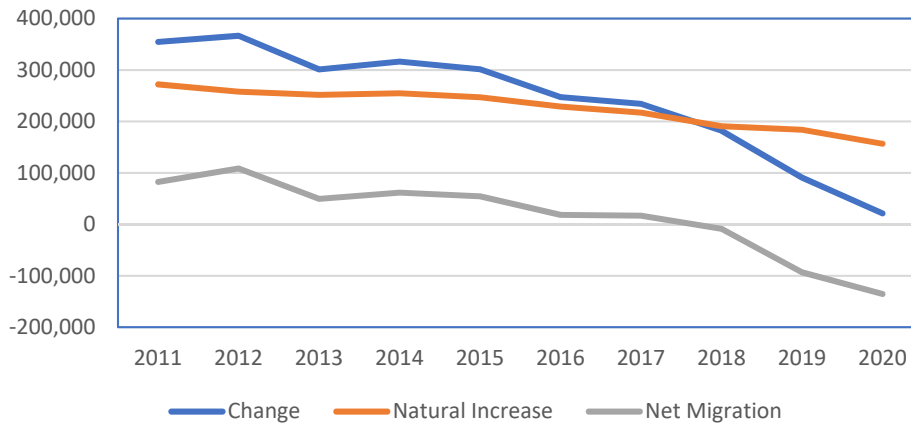
## Thoughts About Future Trends

- The trend of declining population growth from natural increase will continue. Fertility rates are expected to remain low or decline further and an aging population will lead to rising levels of deaths.
- Immigration levels are likely to rebound as the new administration will likely welcome more immigrants—foreign students, needed workers including less restrictive H1-B visas, a more welcoming attitude for foreign tourism combined with a return to air travel and potentially a more welcoming attitude toward refugees and asylum seekers.
- The big unknown is what will happen with domestic migration and state economic competitiveness and job growth. This will depend on how successful regions are in expanding housing supply and affordability, trends in working from home and the foundations for continued job growth and broadly shared prosperity.

## California Estimates

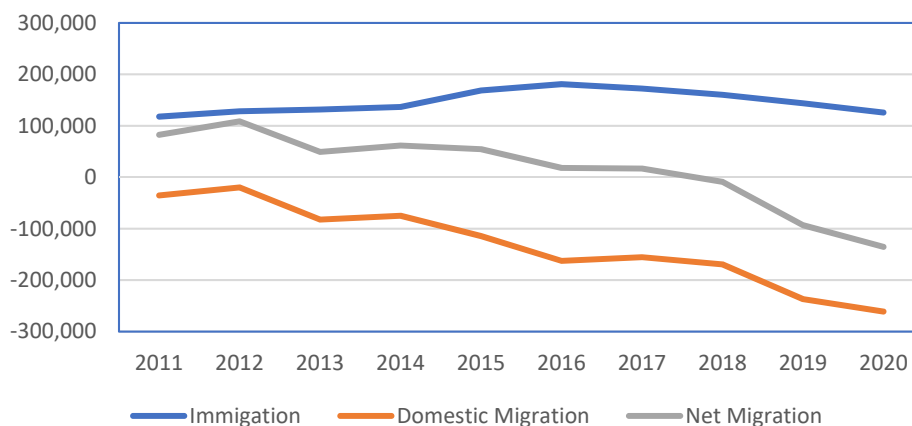
Natural increase contributed less to state growth each year during the past decade but the larger change was in the move from positive to negative net migration. This change pushed state population growth lower each year until it was virtually zero in 2019-20.

## California Components of Population Change 2011-2020



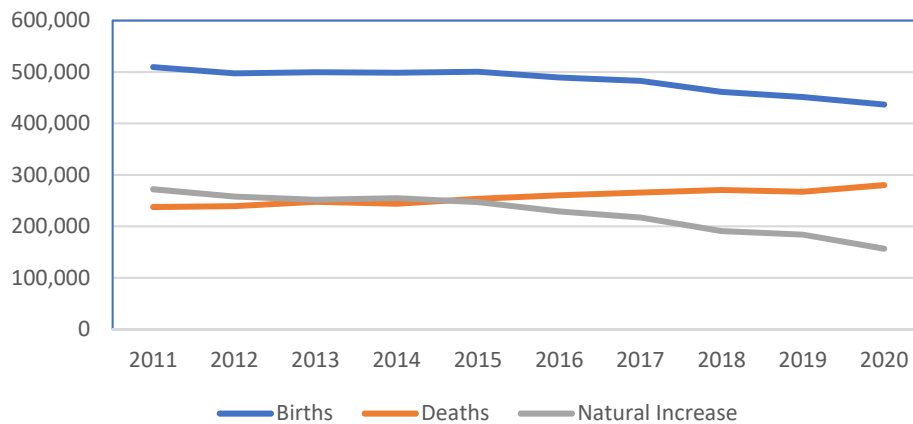
The decline in net migration was the result of recent declines in immigration and the sharp increase in domestic out-migration mostly from the L.A. Basin and Bay Area regions. At the state level, domestic migration means into and out of the state though at the county level migration includes between counties within the state.

## California Components of Net Migration 2011-2020



The changes in birth and death levels are gradual but their continuation in this decade will decrease natural increase each year.

## California Components of Natural Increase 2011-2020



## Los Angeles Basin Estimates

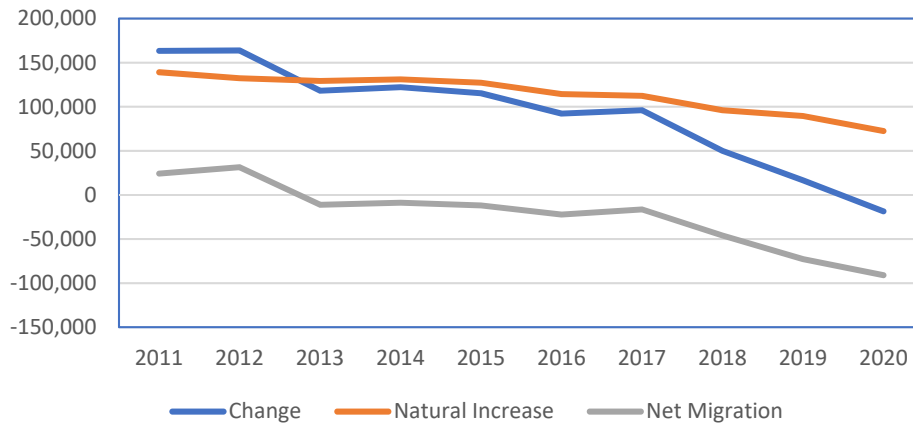
Regional population growth was led by /riverside and San Bernardino counties where housing costs and availability are best in the region. Los Angeles and Ventura counties had the slowest % growth since 2015. All counties except Riverside and San Bernardino lost population in 2019-2020.

Population on July 1 (Thousands)

	2015	2019	2020	2015-20	2019-20
Imperial	184.5	189.0	188.1	2.0%	-0.5%
Los Angeles	10,156.0	10,211.0	10,171.6	0.2%	-0.4%
Orange	3,154.4	3,195.2	3,190.8	1.2%	-0.1%
Riverside	2,327.1	2,428.5	2,449.3	5.3%	0.9%
San Bernardino	2,118.7	2,176.2	2,184.1	3.1%	0.4%
Ventura	848.7	844.2	841.4	-0.9%	-0.3%
<b>Los Angeles Basin</b>	<b>18,789.3</b>	<b>19,044.0</b>	<b>19,025.4</b>	<b>1.3%</b>	<b>-0.1%</b>

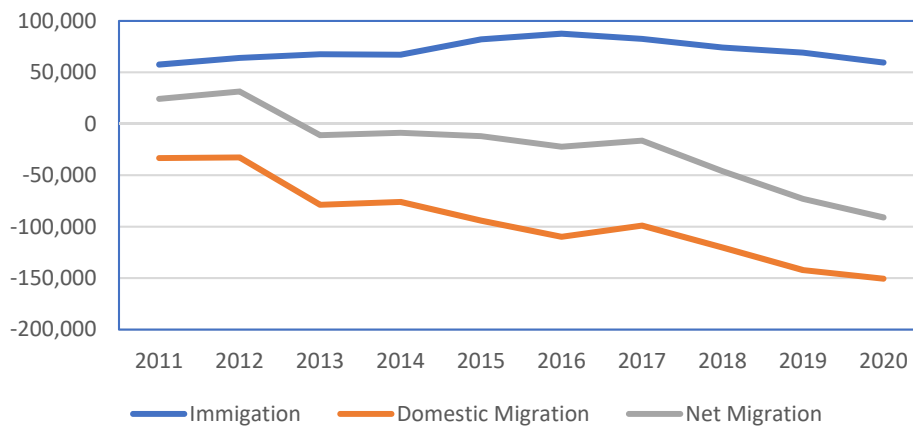
The Basin is the state's largest region with 19 million residents. Population growth slowed during recent years ending with a small decline in 2019-20. As with most regions the biggest change was the sharp decline in migration combined with smaller contributions from natural increase.

## L.A. Basin Components of Population Change 2011-2020



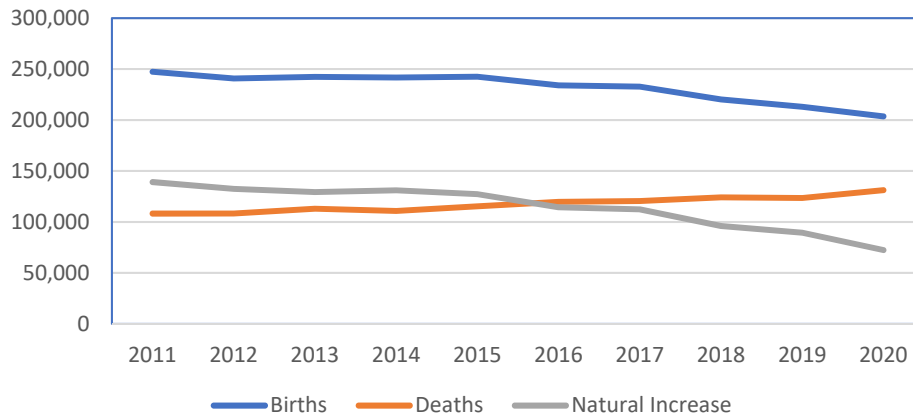
Immigration rose and then declined in recent years with little change over the decade. The big change was the sharp decline in domestic migration with 2/3 of that from Los Angeles County and most of the rest from Orange County. These counties have the highest and fastest growing housing costs in recent years.

## L.A. Basin Components of Net Migration 2011-2020



The pattern of natural increase is similar to that in the state and other regions.

## L.A. Basin Components of Natural Increase 2011-2020



## San Francisco Bay Area

The Bay Area had modest (2%) population growth between 2015 and 2020 with no growth in 2019-20. The 2019-2020 results cover only a small portion of the pandemic activity restrictions and early work from home impacts. On the other hand, pandemic effects should slowly disappear in the near term except for the unknown of lasting work from home effects.

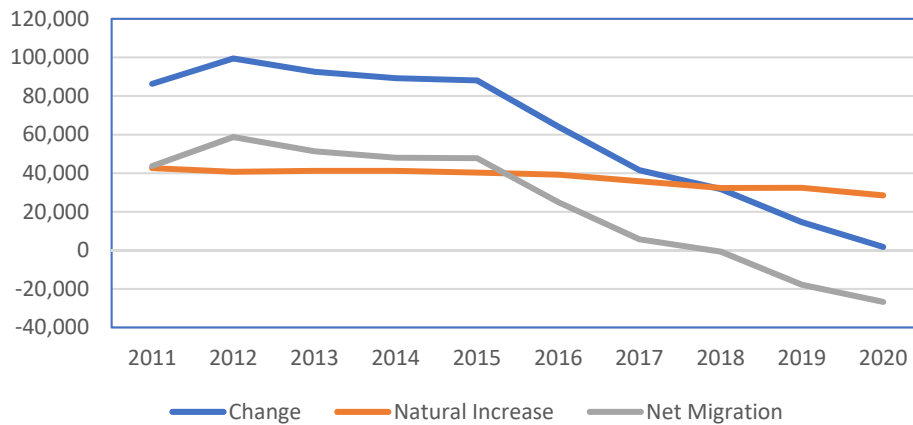
Population on July 1 (Thousands)

	2015	2019	2020	2015-20	2019-20
Alameda	1,622.4	1,669.0	1,671.9	3.0%	0.2%
Contra Costa	1,118.7	1,147.3	1,149.8	2.8%	0.2%
Marin	262.0	261.0	259.0	-1.2%	-0.8%
Napa	141.4	139.9	138.7	-1.9%	-0.8%
San Francisco	869.4	897.1	899.9	3.5%	0.3%
San Mateo	765.8	776.0	775.1	1.2%	-0.1%
Santa Clara	1,924.1	1,960.9	1,962.3	2.0%	0.1%
Solano	428.9	440.0	440.2	2.6%	0.0%
Sonoma	501.5	495.1	491.1	-2.1%	-0.8%
<b>San Francisco Bay Area</b>	<b>7,634.2</b>	<b>7,786.2</b>	<b>7,787.9</b>	<b>2.0%</b>	<b>0.0%</b>

Sonoma and Napa county growth were restrained by people relocating at least temporarily after the fires. Most of the other counties had similar growth rates.

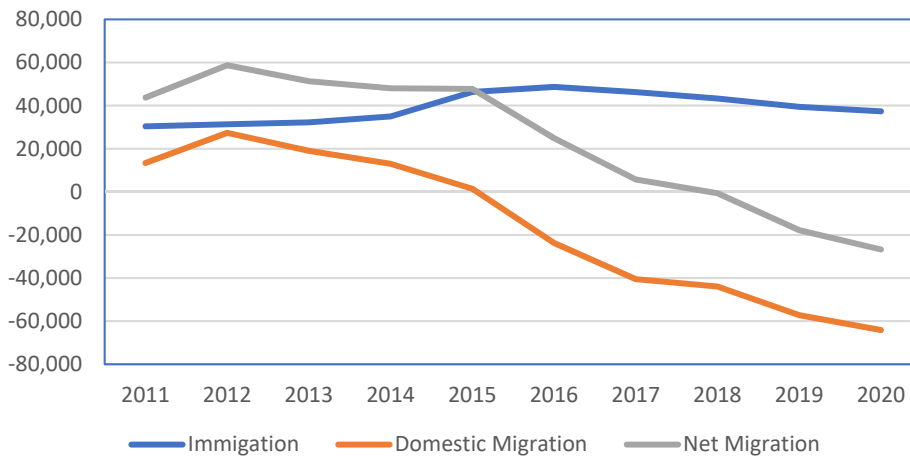
The contribution of natural increase was a small and declining positive while the big change in the region was the sharp decline in net migration. Net out-migration has been increasing since 2015 and is probably attributable to the region's high and rising housing costs and low levels of building relative to demand.

Bay Area Components of Population Change  
2011-2020



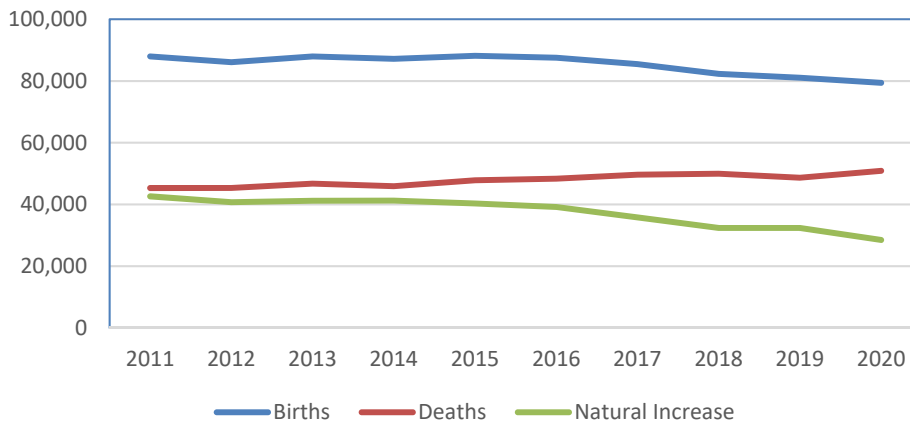
Immigration levels were fairly stable since 2015 while domestic out-migration increased in every year causing net migration to go negative.

## Bay Area Components of Net Migration 2011-2020



The pattern of natural increase was similar to all regions with declining birth levels and increasing death levels.

## Bay Area Components of Natural Increase 2011-2020



## San Joaquin Valley

The Valley was the state's second fastest growing region between 2015 and 2020 trailing only the Sacramento region. The region has two of the state's fastest growing counties—San Joaquin and Merced and two of the state's larger counties—Fresno and Kern. All Valley counties added at least some population in 2019-20.

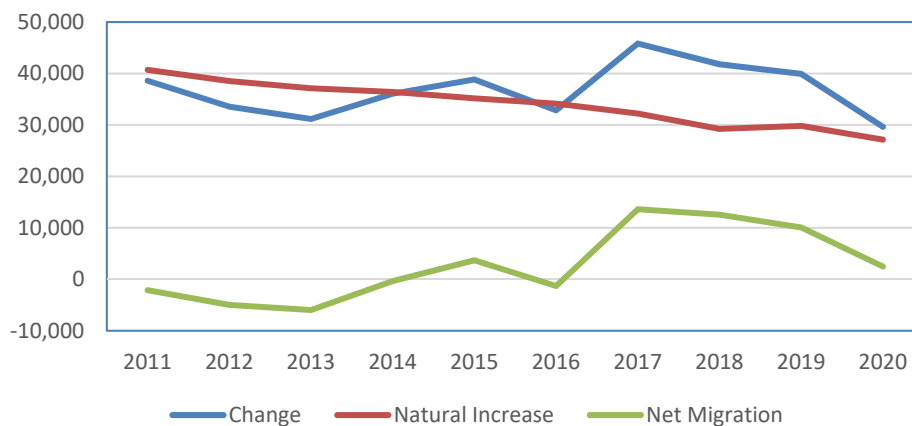


## Population on July 1 (Thousands)

	2015	2019	2020	2015-20	2019-20
Fresno	979.6	1,018.4	1,026.4	4.8%	0.8%
Kern	881.1	909.7	913.0	3.6%	0.4%
Kings	149.5	153.5	154.7	3.5%	0.8%
Madera	154.2	157.7	158.8	3.0%	0.7%
Merced	268.8	281.6	284.8	5.9%	1.1%
San Joaquin	727.0	767.9	776.1	6.7%	1.1%
Stanislaus	536.5	554.2	556.0	3.6%	0.3%
Tulare	463.7	477.7	480.8	3.7%	0.6%
<b>San Joaquin Valley</b>	<b>4,160.5</b>	<b>4,320.8</b>	<b>4,350.4</b>	<b>4.6%</b>	<b>0.7%</b>

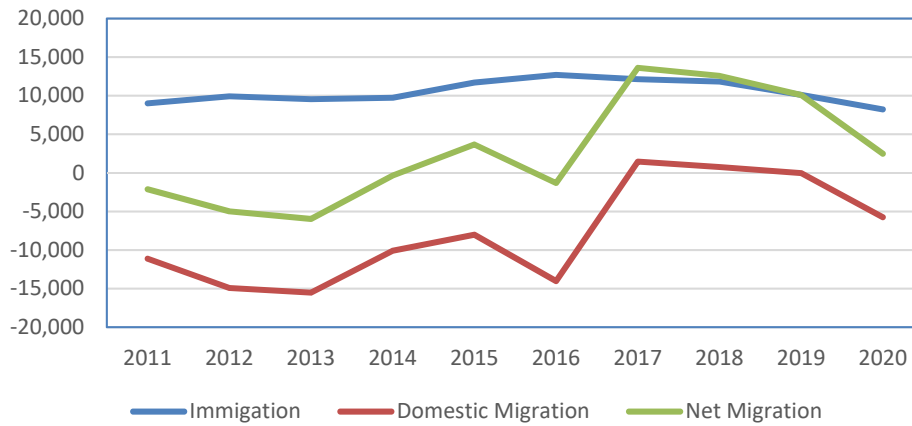
Natural increase was the major contributor to growth in recent years with some small contributions from net migration—though both declined in 2019-20.

## Valley Components of Population Change 2011-2020



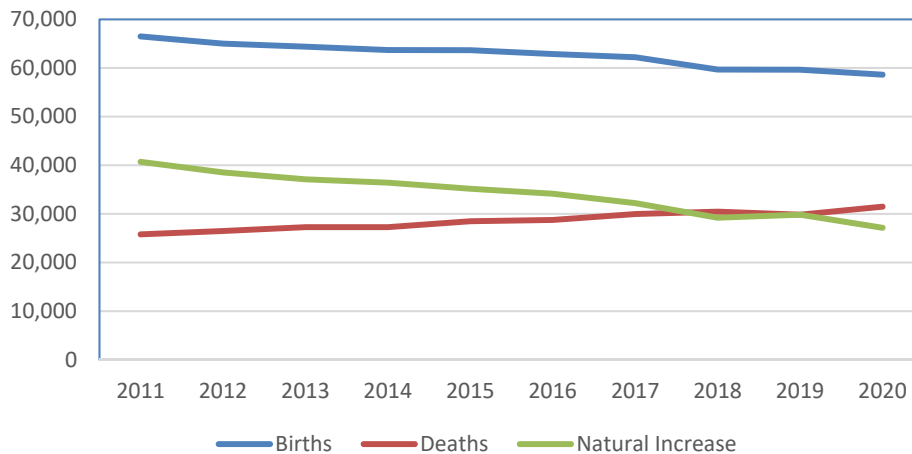
Even though residents from other regions moved to the Valley in search of more affordable housing, this was matched by residents leaving including possibly immigrants returning to their home country. The result was that net migration was not an important factor in Valley growth since 2015.

## Valley Components of Net Migration 2011-2020



The Valley pattern of natural increase is similar to that in other regions—falling birth levels and rising death levels.

## Valley Components of Natural Increase 2011-2020

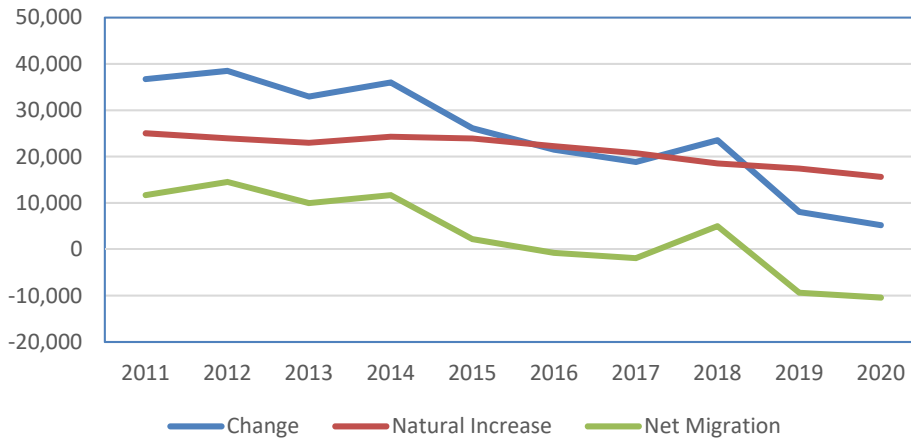


## San Diego Region

San Diego is the only large region comprised of just one county. San Diego County as shown in the report's opening table, grew just slightly faster (2.4%) than the state average (2.0%) between 2015 and 2020 making it California's third fastest growing region.

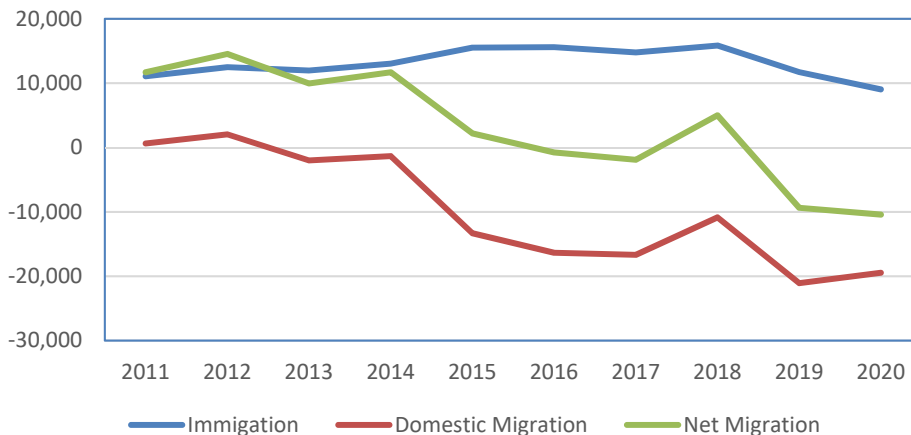
Net migration has been negative since 2015 dragging population growth downward and offsetting small positive natural increase.

San Diego Components of Population Change  
2011-2020



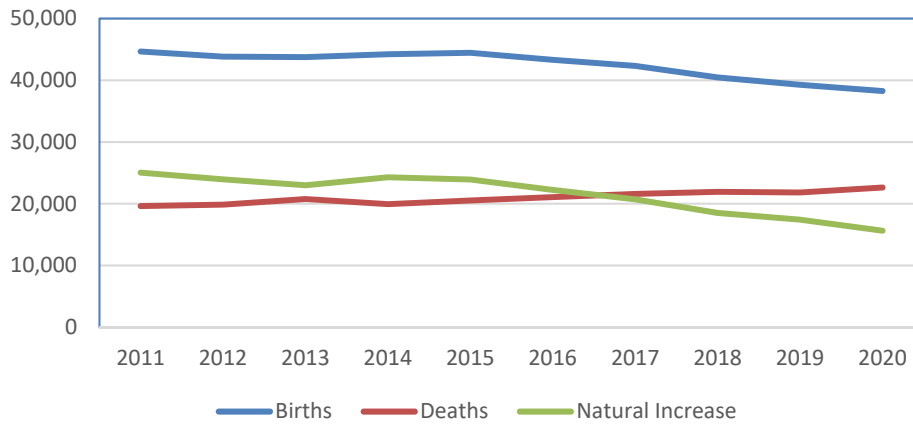
San Diego has one of the most expensive housing markets in the state. As a result, the region has experienced domestic out-migration that has offset small positive immigration levels and pushed net migration negative after 2015.

San Diego Components of Net Migration  
2011-2020



The pattern of natural increase is similar to that in other regions with falling birth levels and rising death levels.

## San Diego Components of Natural Increase 2011-2020



## Sacramento Region

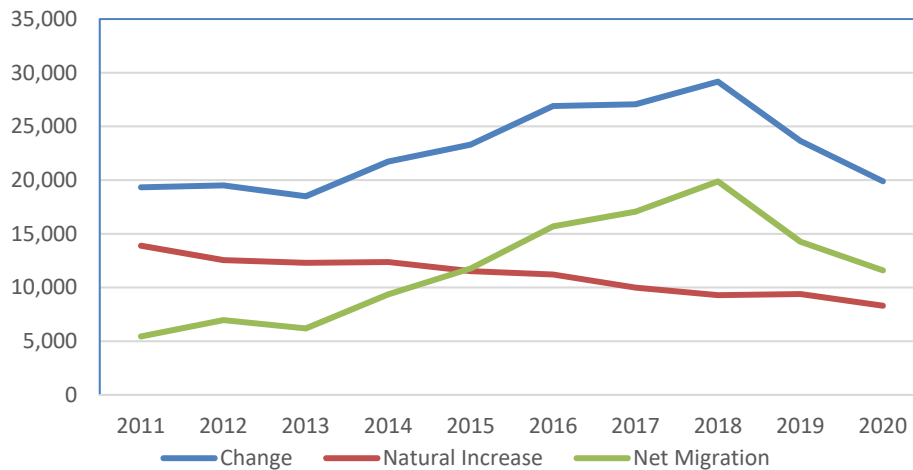
Sacramento was the state's fastest growing region between 2015 and 2020 led by Placer County. The region's growth rate (5.2%) was more than double the state average (2.0%).

Population on July 1 (Thousands)

	2015	2019	2020	2015-20	2019-20
El Dorado	182.6	188.8	192.0	5.2%	1.7%
Placer	371.9	394.6	397.5	6.9%	0.7%
Sacramento	1,488.9	1,548.8	1,562.2	4.9%	0.9%
Sutter	96.8	102.8	101.2	4.5%	-1.6%
Yolo	212.4	220.7	221.7	4.4%	0.5%
Yuba	74.4	78.1	79.1	6.2%	1.3%
<b>Sacramento Region</b>	<b>2,427.0</b>	<b>2,533.8</b>	<b>2,553.7</b>	<b>5.2%</b>	<b>0.8%</b>

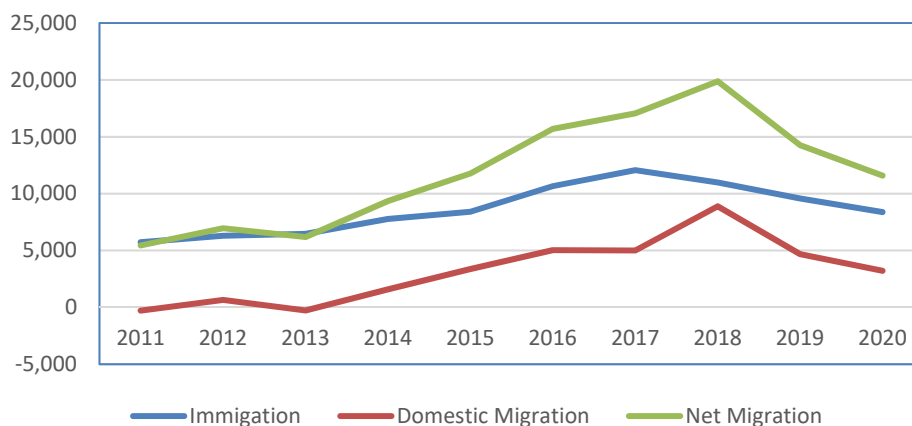
Sacramento is the only region in the state to experience positive net migration in every year since 2011 though net migration has declined in the past two years. Natural increase has declined here as in other regions across the state.

## Sac. Region Components of Population Change 2011-2020



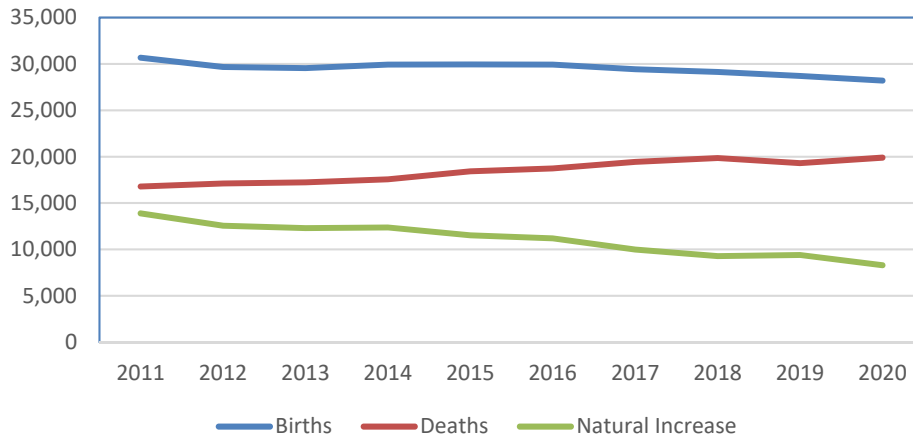
Sacramento is also the only region to experience positive domestic migration in every year since 2015. Part of the explanation is the movement of some Bay Area residents to the region in search of more affordable housing while also maintaining Bay Area jobs. Immigration has remained near 10,000 per year adding to the positive net migration trend.

## Sac. Region Components of Net Migration 2011-2020



The Sacramento region pattern of natural increase is similar to that in other regions with falling birth levels and rising death levels.

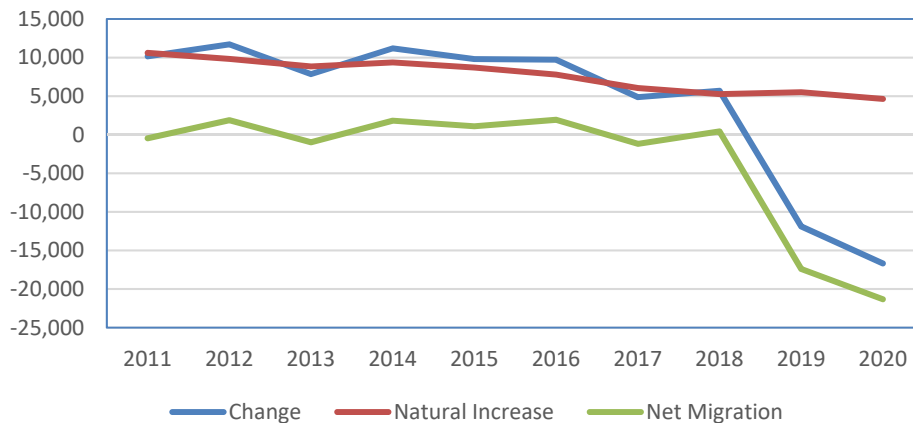
## Sac. Region Components of Natural Increase 2011-2020



## Rest of State Region

The region consists of 25 relatively small rural and mountain counties and three largest coastal counties—Monterey, Santa Barbara and Santa Cruz. Population growth was small and positive until 2019 led by small natural increase. In 2019 and 2020 population levels fell pushed down by large out migration as explained below.

## Rest of State Components of Population Change 2011-2020



Immigration levels have remained small but steady during the past decade. Domestic migration was negative but small until 2019 and was influenced by reductions in prison populations in the region. In

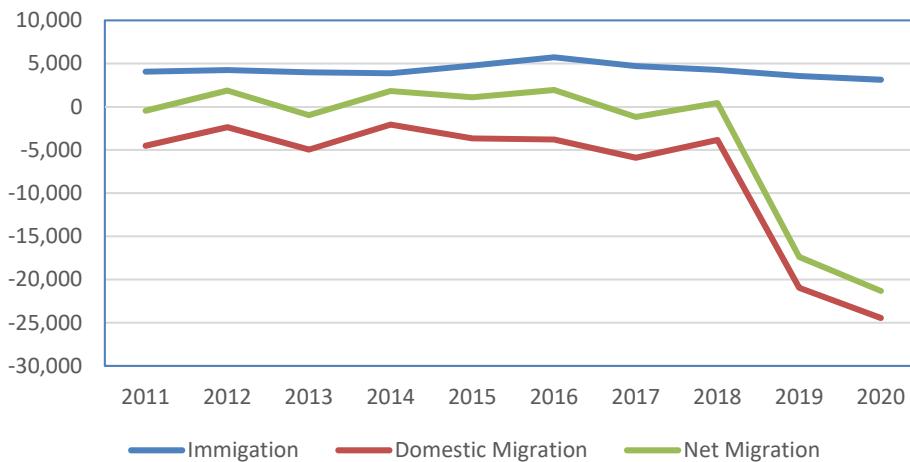
2019 and 2020 domestic migration declined sharply led by the three coastal counties.

In 2019-2020 domestic migration in Monterey County was -6,092, in Santa Barbara County -3,599 and In Santa Cruz County -3,085.

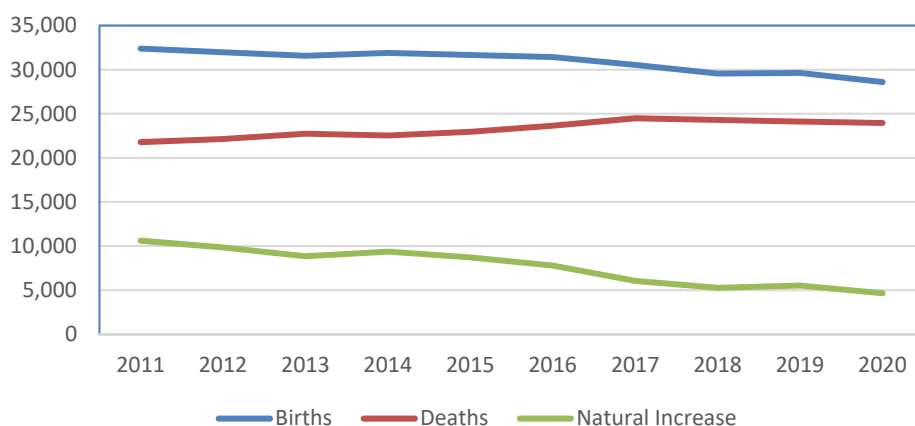
Several years ago, it was thought that the less urban counties might attract new residents in search of lower housing costs and a less stressful life. While this may have happened for a few residents, this region has been the state's slowest growing region throughout the decade.

The final chart shows that the pattern of natural increase in the Rest of State region is similar to that in other regions with falling birth levels and increasing death levels.

**Rest of State Components of Net Migration  
2011-2020**



## Rest of State Components of Natural Increase 2011-2020



Here are the counties in the Rest of State Region

Alpine  
Amador  
Calaveras  
Inyo  
Lassen  
Mariposa  
Modoc  
Mono  
Nevada  
Plumas  
Sierra  
Siskiyou  
Trinity  
Tuolumne

### **Mountain Region**

Butte  
Colusa  
Glenn  
Shasta  
Tehama  
**Sacramento Valley  
Region**

Del Norte  
Humboldt  
Lake  
Mendocino  
**North Coast Region**



Monterey  
San Benito  
San Luis Obispo  
Santa Barbara  
Santa Cruz  
**Coast Region**