

Santa Barbara County Association of
Governments | Planning Division

2025 Regional Growth Forecast

For the 2029-2060 Regional Transportation Plan – Sustainable
Communities Strategy

June 2026



Table of Contents

Overview	2
Summary	2
Purpose	4
Process.....	5
Methodology	6
Forecast Estimates.....	7
Population	7
Households	8
Employment	8
Comparisons.....	13

Figures and Tables

Figure 1. RGF Estimates for Population, Households, and Employment, 1990–2060.....	3
Figure 2. Household Projection Comparison	13
Figure 3. Population Projection Comparison	14
Table 1. Population Estimates, 2025–2060	7
Table 2. Household Projections, 2025–2060	8
Table 3. Employment Estimates, 2024–2060	9
Table 4. Countywide Sector-Based Employment Estimates, 2024–2060	10
Table 5. South Coast Sector-Based Employment Estimates, 2024–2060	11
Table 6. Lompoc Valley Sector-Based Employment Estimates, 2024–2060	11
Table 7. Santa Maria Valley Sector-Based Employment Estimates, 2024–2060.....	12
Table 8. Santa Ynez Valley Sector-Based Employment Estimates, 2024–2060.....	12
Table 9. Cuyama Valley Sector-Based Employment Estimates, 2024–2060	13

Overview

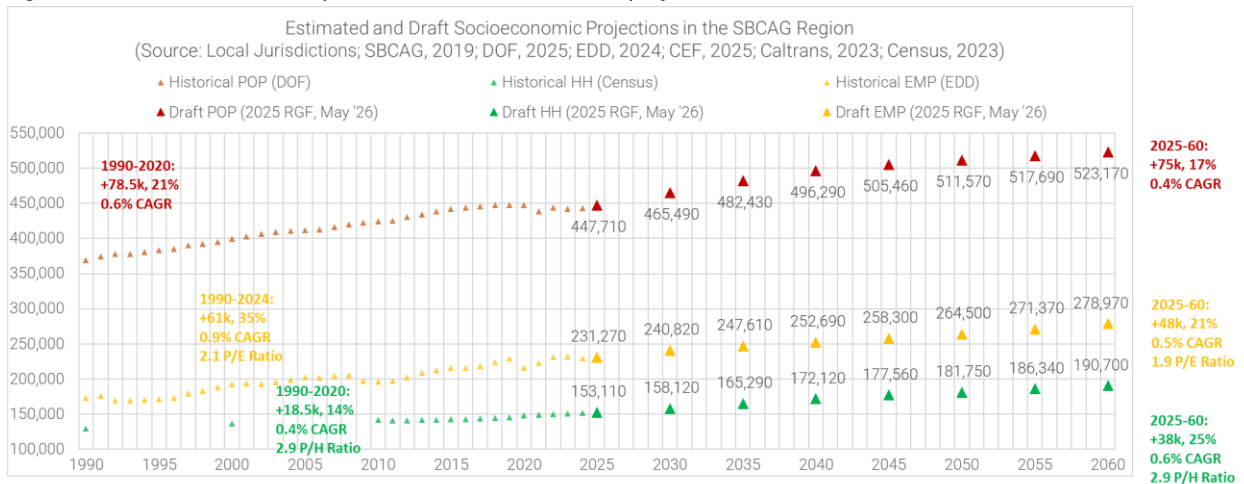
Summary

The 2025 Regional Growth Forecast (“2025 RGF”) provides consistent long-range projections for population, households, and employment through 2060 for Santa Barbara County and its eight incorporated cities. These forecasts support long-range transportation planning, land use modeling, the Regional Housing Needs Assessment (RHNA) process, California Environmental Quality Act (CEQA) analysis, and development of the Regional Transportation Plan-Sustainable Communities Strategy (RTP-SCS). The RGF is prepared as part of SBCAG’s long-range regional planning responsibilities and supports the 20-year planning horizon of the RTP-SCS.

Overall, the 2025-2060 RGF reflects steady but moderate long-term growth across population, households, and employment. Population growth is expected to remain relatively modest, reflecting broader demographic trends such as aging, smaller household sizes, limited housing availability, low net migration, and slower natural increase. Household growth is projected to continue modestly, with the most significant growth anticipated during the 2030–2040 period due to planned housing development. Employment growth is generally expected to outpace population growth over the long term, in part because the county’s job base is supported by both resident workers and in-commuters from outside the SBCAG region.

As with any long-range forecast, the RGF is based on assumptions that are subject to uncertainty and change over time. Additionally, sudden disruptions, such as economic recessions, natural disasters, or major policy changes, can affect growth patterns in any period. For this reason, the RGF should be understood as a planning tool that reflects the best available information at the time of preparation, rather than a precise prediction of future conditions.

Figure 1. RGF Estimates for Population, Households, and Employment, 1990–2060



Key insights from the 2025-2060 Forecast Components are below.

Population

- Population growth is expected to remain modest over the long term (+17% from 2025 to 2060).
- Growth patterns reflect broader demographic trends, including aging and slower natural increase.
- Population change varies across the county based on local conditions and capacity. The cities with the highest projected population growth are Santa Maria (29%), Lompoc (27%), and Goleta (16%).

Households

- Household growth is expected to continue steadily over the forecast period (+25% from 2025 through 2060).
- The strongest household growth is anticipated around the 2030–2040 period, which reflects the timing of expected housing development and broader building trends.
- Household growth may outpace population growth in some periods due to decreasing household sizes. This anticipated decrease is caused by both the aging population, and, ideally, less overcrowding as more housing is built in the region.
- The places with the highest projected household growth are the City of Santa Maria (51%), the unincorporated Santa Maria Valley (39%), and the City of Lompoc (33%).

Employment

- Employment is projected to grow 21% between 2025 and 2060.


- Job growth is expected to outpace population growth due to the in-commuting population.
- The fastest growing economic sector over the forecast period in the County is Healthcare (and private education). This is due in part due to the aging population and their associated healthcare needs.
- Employment growth is fastest in the Cities of Santa Barbara (26%), Buellton (29%), and Lompoc (22%).
- Major unincorporated job centers in 2060 include the Eastern Goleta Valley (12k jobs in 2060), Orcutt (8.5k jobs), UCSB (7.5k jobs), Montecito (4.9k jobs), and Vandenberg SFB (3.5k jobs).

Purpose

The purpose of the 2025 RGF is to provide consistent long-range population, employment, and housing forecasts for use in long-range regional planning. The SBCAG Board has adopted previous RGF's approximately every four to eight years, most recently in 2019. The forecast is monitored for consistency with other forecasts and updated as necessary to ensure it provides the most accurate assessment of future growth.

The RGF presents a forecast of population, households and employment, to the year 2060 for Santa Barbara County, its major economic and demographic regions, and its eight incorporated cities. Based on the guiding Federal and State regulations regarding RTP development, the California Transportation Commission (CTC) in its 2024 RTP Guidelines, Title 23 CFR §450.324, requires the transportation plan's validity and consistency with current and forecasted transportation and land use conditions and trends and extends the forecast period to at least a 20-year planning horizon. This forecast will serve as the future "base case" for the development and assessment of RTP alternative growth scenarios developed for the Sustainable Communities Strategy (SCS) pursuant to SB 375 (2008).

In addition, the forecast will serve as an input into the State Department of Housing and Community Development (HCD) Regional Housing Needs Assessment (RHNA) for the Santa Barbara County region. SB 375 contains specific provisions that require HCD to consider the RGF in formulating its RHNA determination and encourage consistency between the RGF and the State Department of Finance (DOF) growth forecast. (Gov. Code Sec. 65584.01(b).). AB 1086 allows the use of the locally developed population forecast if it is within 1.5% of the DOF population forecast over the housing forecast period (approx. 2022-2030). DOF allows consultation (26 months prior to scheduled RHNA) using assumptions from the local forecast. Ultimately, the DOF forecast is used in the RHNA if no local adjustments are made. Similarly, the SCS must "identify areas within the region sufficient to house an eight-year forecast of the regional housing need for the region," i.e., accommodate and be consistent with the RHNA. (Gov. Code Sec. 65080(b)(2)(iii).)



At a regional and local level, the forecast also serves as an input towards the development of travel forecasts and analysis, air quality impact analysis, and demand estimates for sewer treatment plants and other facilities. The forecast is also a resource for social service agencies, marketing studies, and analysis of growth-related issues.

Process

The SBCAG Technical Planning Advisory Committee (TPAC) met four times, beginning in September 2025 through May 2026, to review and discuss the forecast technical details, assumptions, and results. SBCAG staff and TPAC reviewed other Metropolitan Planning Organization (MPO)'s forecasting methodologies, determined an approach, and fine-tuned the methodology based on local knowledge and recent development information.

SBCAG staff first prepared countywide estimates for population, households, and employment before developing subregional and jurisdiction-level forecasts. This approach allowed staff to establish a consistent regional forecast framework before allocating growth to smaller geographies. Countywide assumptions were informed by available demographic, economic, and housing data, including state forecasts, recent Census and American Community Survey (ACS) information, employment data, building trends, and other relevant sources.

In addition to the TPAC review, draft RGF materials were provided to Dr. Mark Schniepp of the California Economic Forecast for review. Dr. Schniepp is an accomplished economist and former UCSB professor whose work through the California Economic Forecast has informed economic projections used by Caltrans. This review provided an additional economic perspective on the forecast assumptions and long-term employment trends.

Following the development of the preliminary countywide forecast, SBCAG conducted a Local Input Process (LIP) to gather feedback from local jurisdictions and partner agencies through individualized reports and multiple rounds of communication. The purpose of this process was to ensure that the forecast reflected not only regional and statewide trends, but also local knowledge regarding planned development, housing production, land use capacity, major employers, infrastructure constraints, and other community-specific factors that may influence future growth. Local jurisdictions were asked to review preliminary forecast assumptions and identify areas where recent conditions, approved projects, or local planning efforts suggested that adjustments may be needed.

Feedback received through LIP was used to refine the forecast, including revisions to countywide population and household estimates and adjustments to subregional and jurisdiction-level assumptions. This process helped improve the forecast's consistency with recent building activity, local land use information, and jurisdictional expectations while maintaining a regionally balanced methodology. As a result, the RGF reflects a

combination of technical analysis, regional trend data, economic review, TPAC guidance, and local input.

Methodology

To support a realistic and consistent forecast, projections used reputable state and regional data sources, including the California DOF, Employment Development Department (EDD), Caltrans California Economic Forecast, and ACS. The overall methodology is a combination of a bottom-up and top-down approach. Staff first developed countywide estimates, then allocated growth to subregions and jurisdictions. The first iteration of the 2025 RGF estimates mainly used DOF's projected population and households, which utilized the traditional cohort-component model to understand demand based on demographic factors. The second iteration incorporated inputs from local jurisdictions, which focused more on the General Plan buildout capacity. As such, based on local feedback, staff revised population and household estimates to better reflect local knowledge, anticipated development activity, and current conditions. The projection methodologies and sources are summarized below, with detailed information and existing conditions analysis in the 2025 Regional Growth Forecast Technical Appendix.

1. Households: Household projections were developed using a combination of RHNA 6th Cycle allocations, recent household estimates from DOF, Census/ACS household trends, vacancy assumptions, and local input. RHNA allocations were used as a proxy to inform near-term household growth, while longer-term household growth was distributed based on historical trends, prior RGF shares, DOF population growth assumptions, and locally identified development activity. The resulting jurisdiction and subregional household projections were then adjusted based on local input to reflect recent development patterns and known growth opportunities.

2. Population: Population projections were developed after the household projections by applying projected household size assumptions to the household totals for each jurisdiction and subregion. Household size assumptions were based on historical Census/ACS and DOF trends, with adjustments made to better reflect long-term demographic changes and local conditions. Group quarters population was then added separately using the DOF E-5 table and known or anticipated group quarters changes, such as student housing, to produce total population projections.

3. Employment: Countywide employment projections were developed using EDD employment projections (2022-2032) and industry growth rates from the Caltrans California Economic Forecast (2023-2050). Staff applied the 2030–2050 growth rates by industry through 2060, with Healthcare and Education employment held flat from 2050 to

2060 to avoid overstating long-term growth. Self-employment was maintained at approximately 7 percent of total employment, consistent with historical trends from ACS.

3) a. Subregional Employment: Subregional employment projections were developed by using 2024 EDD QCEW (Quarterly Census on Employment and Wages) data to calculate each subregion’s share of countywide employment by industry sector through 2060. Staff conducted QA/QC using population-to-employment ratios and supplemented suppressed data using local agency input, nonprofit data, and LEHD (Longitudinal Employer-Household Dynamics) estimates.

Forecast Estimates

Population

Population growth is forecast to remain moderate countywide, increasing by approximately 17% between 2025 and 2060. Growth is not evenly distributed across the region. Incorporated areas are expected to grow at a slightly faster rate than the county overall, and more growth is anticipated in the North County than in the Southcoast subregion. The highest percentage of population growth is forecast in Santa Maria, Lompoc, and Goleta, where recent development activity, planned housing opportunities, and average household sizes support continued population increases.

Table 1. Population Estimates, 2025-2060

Geography	% Growth 2025-2060	2025	2030	2035	2040	2045	2050	2055	2060
Buellton city	13.8%	5,090	5,180	5,390	5,540	5,630	5,690	5,740	5,790
Carpinteria city	5.4%	12,740	12,850	13,050	13,190	13,300	13,350	13,400	13,430
Goleta city	15.6%	32,750	34,060	35,630	36,640	37,140	37,380	37,630	37,860
Guadalupe city	15.0%	8,850	9,110	9,420	9,710	9,890	9,990	10,090	10,180
Lompoc city	27.0%	43,600	44,230	45,480	47,290	49,100	50,850	53,170	55,390
Santa Barbara city	5.9%	86,450	87,460	88,710	89,690	90,580	91,030	91,410	91,570
Santa Maria city	29.3%	112,210	119,970	128,460	135,420	139,430	141,630	143,430	145,090
Solvang city	8.2%	5,760	5,830	5,950	6,040	6,110	6,160	6,200	6,230
Incorporated Areas	18.9%	307,440	318,690	332,090	343,520	351,190	356,090	361,070	365,540
Unincorporated Areas	12.4%	140,270	146,800	150,330	152,770	154,270	155,480	156,620	157,630
South Coast/Other	13.4%	71,030	75,310	77,770	78,900	79,440	79,880	80,220	80,520
Santa Maria/Guad/Cuy	18.1%	36,480	37,940	38,870	40,040	40,930	41,650	42,410	43,100
Lompoc	5.4%	16,210	16,620	16,770	16,900	16,970	17,020	17,070	17,090
Santa Ynez	2.2%	16,550	16,930	16,920	16,930	16,930	16,930	16,930	16,920
Santa Barbara County	16.9%	447,710	465,490	482,430	496,290	505,460	511,570	517,690	523,170

*Totals are independently rounded.

Households

Households are projected to increase by approximately 25% countywide between 2025 and 2060, outpacing population growth. This reflects long-term trends toward smaller average household sizes, aging households, and continued demand for additional housing units even where population growth is more moderate. Incorporated areas account for most of the projected household growth, with the fastest growing cities being Santa Maria, Lompoc, Guadalupe, and Goleta. Similar to the population growth, the North County subregion is anticipated to have higher growth than the Southcoast subregion.

Table 2. Household Projections, 2025-2060

Geography	% Growth 2025-2060	2025	2030	2035	2040	2045	2050	2055	2060
Buellton city	18.6%	2,000	2,030	2,130	2,200	2,250	2,290	2,330	2,370
Carpinteria city	7.1%	5,010	5,070	5,160	5,230	5,280	5,320	5,350	5,370
Goleta city	16.1%	12,520	13,030	13,630	14,040	14,240	14,340	14,440	14,540
Guadalupe city	19.6%	2,360	2,430	2,520	2,620	2,690	2,730	2,780	2,820
Lompoc city	32.7%	14,190	14,420	14,880	15,580	16,280	16,970	17,900	18,830
Santa Barbara city	10.0%	36,220	36,730	37,560	38,320	39,000	39,380	39,690	39,830
Santa Maria city	50.7%	30,780	33,120	36,240	39,350	41,690	43,250	44,810	46,370
Solvang city	8.5%	2,520	2,550	2,610	2,650	2,680	2,700	2,720	2,730
Incorporated Areas	25.8%	105,600	109,380	114,720	119,980	124,110	126,990	130,020	132,870
Unincorporated Areas	21.7%	47,510	48,750	50,560	52,140	53,450	54,760	56,310	57,830
South Coast/Other	20.8%	23,150	24,120	25,320	26,040	26,530	27,010	27,490	27,970
Santa Maria/Guad/Cuy	39.3%	12,460	12,710	13,200	13,930	14,670	15,400	16,380	17,360
Lompoc	8.6%	5,520	5,550	5,640	5,730	5,810	5,880	5,950	6,000
Santa Ynez	2.1%	6,370	6,380	6,410	6,430	6,450	6,470	6,490	6,510
Santa Barbara County	24.6%	153,110	158,120	165,290	172,120	177,560	181,750	186,340	190,700

*Totals are independently rounded.

Employment

Countywide employment is projected to increase from approximately 229,400 jobs in 2024 to approximately 279,000 jobs by 2060. Growth is expected to occur across both the South Coast and North County, with the South Coast continuing to account for a slightly larger share of total countywide employment over the forecast period. The overall distribution of employment between the South Coast and North County remains relatively stable, and future job growth is expected to build on existing regional employment.

The South Coast is projected to remain the county's largest employment center, increasing from approximately 123,600 jobs in 2024 to approximately 152,200 jobs in 2060. On the South Coast, the City of Santa Barbara continues to represent the largest number of jobs,

followed by Goleta and the unincorporated South Coast. North County employment is also projected to grow steadily, led by the Santa Maria Valley, which remains the largest employment center outside the South Coast. The Santa Maria Valley is projected to continue accounting for nearly one-third of countywide employment, with the City of Santa Maria serving as the primary job center in the subregion.

Table 3. Employment Estimates, 2024-2060

Geography	2024 Share	2060 Share	2024	2025	2030	2040	2050	2060
County Total	100%	100%	229,430	231,270	240,820	252,690	264,500	278,970
South Coast Total	53.9%	54.6%	123,630	124,720	130,410	137,280	144,020	152,250
North County Total	46.1%	45.4%	105,800	106,550	110,410	115,400	120,490	126,720
Incorporated Total	76.5%	77.5%	175,600	177,020	184,360	194,060	204,030	216,270
Unincorporated Total	23.5%	22.5%	53,830	54,250	56,470	58,640	60,480	62,700
South Coast Total	53.9%	54.6%	123,630	124,720	130,410	137,280	144,020	152,250
City of Carpinteria	3.2%	3.0%	7,350	7,410	7,700	7,970	8,200	8,480
City of Santa Barbara	28.1%	29.5%	64,450	65,050	68,120	72,380	76,810	82,240
City of Goleta	10.9%	10.5%	25,090	25,290	26,330	27,370	28,280	29,390
Eastern Goleta Valley	4.3%	4.3%	9,820	9,900	10,310	10,820	11,320	11,940
Isla Vista	0.5%	0.5%	1,180	1,190	1,240	1,300	1,360	1,430
UCSB	2.7%	2.7%	6,200	6,250	6,510	6,830	7,150	7,540
Montecito	1.8%	1.8%	4,020	4,050	4,220	4,430	4,640	4,890
Summerland	0.2%	0.2%	530	540	560	590	620	650
Toro Canyon	0.6%	0.6%	1,440	1,460	1,520	1,590	1,670	1,760
Mission Canyon	0.1%	0.1%	240	240	250	270	280	290
Lompoc Valley Total	6.9%	6.9%	15,940	16,080	16,810	17,570	18,270	19,130
City of Lompoc	4.6%	4.7%	10,600	10,700	11,190	11,760	12,340	13,040
Mission Hills	0.1%	0.1%	190	190	200	200	210	230
Vandenberg	0.3%	0.3%	760	760	800	840	880	920
Vandenberg SFB	1.3%	1.3%	2,890	2,910	3,030	3,180	3,330	3,510
Santa Maria Valley Total	32.3%	31.9%	74,160	74,640	77,120	80,630	84,330	88,890
City of Santa Maria	25.5%	25.5%	58,540	58,930	60,980	63,970	67,200	71,180
City of Guadalupe	0.6%	0.6%	1,340	1,360	1,410	1,470	1,540	1,630
Orcutt	3.1%	3.1%	7,020	7,070	7,360	7,730	8,090	8,530
Santa Ynez Valley Total	6.7%	6.5%	15,290	15,420	16,060	16,780	17,440	18,250
City of Solvang	1.6%	1.6%	3,740	3,770	3,920	4,090	4,260	4,460
City of Buellton	2.0%	2.1%	4,480	4,520	4,720	5,040	5,400	5,840
Santa Ynez	0.7%	0.7%	1,530	1,540	1,600	1,680	1,760	1,860
Los Alamos	0.2%	0.2%	450	450	470	490	510	540
Los Olivos	0.4%	0.4%	810	810	850	890	930	980
Ballard	0.1%	0.1%	300	300	310	330	340	360
Cuyama Valley Total	0.2%	0.2%	410	410	420	430	440	450

*Totals are independently rounded.

By sector, the forecast reflects a continued transition toward service-oriented employment, with Health and Education projected to account for a growing share of countywide jobs over time. Professional Services, Leisure, Government, Self-Employment, and other service-based sectors also remain important components of the regional economy. Farm employment continues to represent a significant share of employment in North County, particularly in the Santa Maria Valley and Cuyama Valley. Wholesale and Retail Trade is projected to make up a smaller share of total employment by 2060.

Table 4. Countywide sector-based Employment Estimates, 2024-2060 (City-level sector data available in Technical Appendix).

Geography / Sector	2024 Share	2060 Share	2024	2025	2030	2040	2050	2060
County Total	100%	100%	229,430	231,270	240,820	252,690	264,500	278,970
<i>Farm</i>	13.2%	11.4%	30,220	30,260	30,450	30,860	31,310	31,800
<i>Construction</i>	4.5%	4.4%	10,390	10,530	11,240	11,740	11,980	12,240
<i>Manufacturing</i>	5.4%	4.9%	12,420	12,500	12,910	13,250	13,460	13,680
<i>Wholesale & Retail Trade</i>	10.0%	7.5%	22,950	22,980	23,170	22,520	21,660	20,840
<i>Transportation, Utilities</i>	1.8%	1.5%	4,020	4,050	4,200	4,230	4,190	4,160
<i>Information</i>	1.6%	1.5%	3,780	3,820	4,040	4,110	4,080	4,050
<i>Financial Activities</i>	2.9%	2.5%	6,710	6,710	6,690	6,740	6,810	6,880
<i>Professional Services</i>	10.4%	9.4%	23,790	23,980	24,980	25,630	25,920	26,220
<i>Health & Education</i>	13.3%	22.8%	30,400	30,960	33,880	41,640	51,520	63,740
<i>Leisure</i>	12.4%	11.7%	28,420	28,630	29,730	30,850	31,710	32,590
<i>Government</i>	14.6%	12.9%	33,480	33,840	35,710	36,380	36,230	36,090
<i>Not Listed</i>	3.0%	2.6%	6,780	6,800	6,950	7,040	7,090	7,140
<i>Self-Employment</i>	7.0%	7.0%	16,060	16,190	16,860	17,690	18,520	19,530

Table 5. South Coast sector-based Employment Estimates, 2024-2060 (City-level sector data available in Technical Appendix).

Geography / Sector	2024 Share	2060 Share	2024	2025	2030	2040	2050	2060
South Coast Total	53.9%	54.6%	123,630	124,720	130,410	137,280	144,020	152,250
Farm	2.2%	1.9%	2,690	2,700	2,720	2,750	2,790	2,840
Construction	5.1%	4.9%	6,290	6,370	6,800	7,100	7,250	7,400
Manufacturing	5.9%	5.3%	7,330	7,370	7,620	7,820	7,940	8,070
Wholesale & Retail Trade	9.4%	6.9%	11,580	11,600	11,690	11,360	10,930	10,510
Transportation, Utilities	1.2%	1.0%	1,540	1,550	1,600	1,620	1,600	1,590
Information	2.8%	2.5%	3,500	3,540	3,740	3,800	3,770	3,740
Financial Activities	4.0%	3.3%	4,900	4,890	4,880	4,920	4,970	5,020
Professional Services	13.7%	12.3%	16,990	17,130	17,840	18,300	18,510	18,730
Health & Education	14.1%	24.0%	17,430	17,750	19,420	23,870	29,540	36,540
Leisure	14.8%	13.8%	18,350	18,490	19,190	19,920	20,470	21,040
Government	15.7%	13.8%	19,430	19,640	20,730	21,110	21,030	20,940
Not Listed	3.7%	3.2%	4,580	4,600	4,690	4,760	4,800	4,830
Self-Employment	7.3%	7.2%	9,040	9,110	9,490	9,950	10,420	10,990

Table 6: Lompoc Valley sector-based Employment Estimates, 2024-2060 (City-level sector data available in Technical Appendix).

Geography / Sector	2024 Share	2060 Share	2024	2025	2030	2040	2050	2060
Lompoc Valley Total	6.9%	6.9%	15,940	16,080	16,810	17,570	18,270	19,130
Farm	4.1%	3.6%	660	660	660	670	680	690
Construction	3.6%	3.5%	570	580	620	650	660	670
Manufacturing	5.8%	5.3%	920	930	960	990	1,000	1,020
Wholesale & Retail Trade	11.3%	8.6%	1,800	1,800	1,820	1,770	1,700	1,640
Transportation, Utilities	1.7%	1.5%	270	270	280	280	280	280
Information	0.2%	0.2%	30	30	30	30	30	30
Financial Activities	1.7%	1.4%	270	270	270	270	270	280
Professional Services	11.7%	10.8%	1,870	1,880	1,960	2,010	2,040	2,060
Health & Education	11.5%	20.0%	1,830	1,860	2,040	2,500	3,100	3,830
Leisure	9.8%	9.4%	1,560	1,570	1,630	1,690	1,740	1,790
Government	26.6%	23.9%	4,250	4,290	4,530	4,610	4,600	4,580
Not Listed	2.3%	2.1%	370	380	380	390	390	400
Self-Employment	9.7%	9.8%	1,540	1,560	1,620	1,700	1,780	1,880

Table 7. Santa Maria Valley sector-based Employment Estimates, 2024-2060 (City-level sector data available in Technical Appendix).

Geography / Sector	2024 Share	2060 Share	2024	2025	2030	2040	2050	2060
Santa Maria Valley Total	32.3%	31.9%	74,160	74,640	77,120	80,630	84,330	88,890
Farm	34.2%	30.0%	25,370	25,400	25,570	25,910	26,290	26,700
Construction	3.7%	3.6%	2,740	2,780	2,960	3,090	3,160	3,230
Manufacturing	3.9%	3.5%	2,860	2,880	2,970	3,050	3,100	3,140
Wholesale & Retail Trade	11.0%	8.3%	8,160	8,170	8,230	8,010	7,700	7,410
Transportation, Utilities	2.5%	2.2%	1,860	1,870	1,940	1,950	1,940	1,920
Information	0.3%	0.3%	240	250	260	260	260	260
Financial Activities	1.7%	1.5%	1,300	1,290	1,290	1,300	1,310	1,330
Professional Services	5.6%	5.1%	4,120	4,160	4,330	4,440	4,490	4,540
Health & Education	13.0%	22.7%	9,620	9,790	10,710	13,170	16,290	20,160
Leisure	7.1%	6.8%	5,270	5,310	5,510	5,720	5,880	6,040
Government	9.5%	8.5%	7,040	7,120	7,510	7,650	7,620	7,590
Not Listed	1.9%	1.7%	1,420	1,430	1,460	1,480	1,490	1,500
Self-Employment	5.6%	5.7%	4,160	4,200	4,370	4,580	4,800	5,060

Table 8. Santa Ynez Valley sector-based Employment Estimates, 2024-2060 (City-level sector data available in Technical Appendix).

Geography / Sector	2024 Share	2060 Share	2024	2025	2030	2040	2050	2060
Santa Ynez Valley Total	6.7%	6.5%	15,290	15,420	16,060	16,780	17,440	18,250
Farm	8.7%	7.7%	1,330	1,330	1,340	1,360	1,380	1,400
Construction	5.0%	4.9%	760	770	830	860	880	900
Manufacturing	8.3%	7.7%	1,270	1,280	1,320	1,360	1,380	1,400
Wholesale & Retail Trade	9.2%	7.0%	1,400	1,410	1,420	1,380	1,330	1,280
Transportation, Utilities	2.3%	2.0%	360	360	370	380	370	370
Information	0.1%	0.1%	10	10	10	10	10	10
Financial Activities	1.4%	1.2%	210	210	210	210	210	220
Professional Services	5.2%	4.8%	800	810	840	860	870	880
Health & Education	10.0%	17.5%	1,520	1,550	1,700	2,090	2,580	3,190
Leisure	21.2%	20.4%	3,240	3,260	3,390	3,520	3,620	3,720
Government	17.7%	16.0%	2,710	2,740	2,890	2,940	2,930	2,920
Not Listed	2.6%	2.3%	400	400	410	410	420	420
Self-Employment	8.3%	8.5%	1,270	1,280	1,340	1,400	1,470	1,550

Table 9. Cuyama Valley sector-based Employment Estimates, 2024-2060

Geography / Sector	2024 Share	2060 Share	2024	2025	2030	2040	2050	2060
Cuyama Valley Total	0.2%	0.2%	410	410	420	430	440	450
Farm	40.1%	38.4%	160	160	160	170	170	170
Construction	6.9%	7.4%	30	30	30	30	30	30
Manufacturing	9.9%	9.8%	40	40	40	40	40	40
Wholesale & Retail Trade	1.7%	1.3%	10	10	10	10	10	10
Financial Activities	9.9%	9.2%	40	40	40	40	40	40
Professional Services	2.0%	2.0%	10	10	10	10	10	10
Health & Education	2.2%	4.0%	10	10	10	10	15	20
Government	12.8%	12.3%	50	50	50	60	60	60
Not Listed	3.9%	3.8%	20	20	20	20	20	20
Self-Employment	10.6%	11.8%	40	40	50	50	50	50

Comparisons

For households, the updated 2025 RGF is higher than the March 2026 DOF-based forecast, but lower than the 2019 RGF. The DOF-based household projection reflects slower long-term household growth, while the updated LIP forecast incorporates more recent building trends and local input regarding planned housing development. As a result, the updated forecast shows somewhat stronger household growth than the DOF-based version, particularly in the middle and later years of the forecast period. However, it remains below the 2019 RGF, which projected a higher long-term household total by 2050.

Figure 2. Household Projection Comparison



For the population, the updated 2025 RGF also generally falls between the DOF forecast and the 2019 RGF. The DOF forecast reflects slower long-term population growth, consistent with broader demographic trends such as aging, lower natural increase, and slower statewide growth. The updated RGF is somewhat higher, reflecting local review of housing assumptions and expected household growth, which is more focused on the General Plan capacity. However, it remains below the 2019 RGF, which anticipated stronger population growth through the long-range forecast period.

Figure 3. Population Projection Comparison

