Santa Barbara County Association of Governments
Planning Division

2025 Regional Growth Forecast Technical Appendix

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

SBCAG
SANTA BARBARA COUNTY ASSOCIATION OF GOVERNMENTS

June 2026

Table of Contents

Introduction

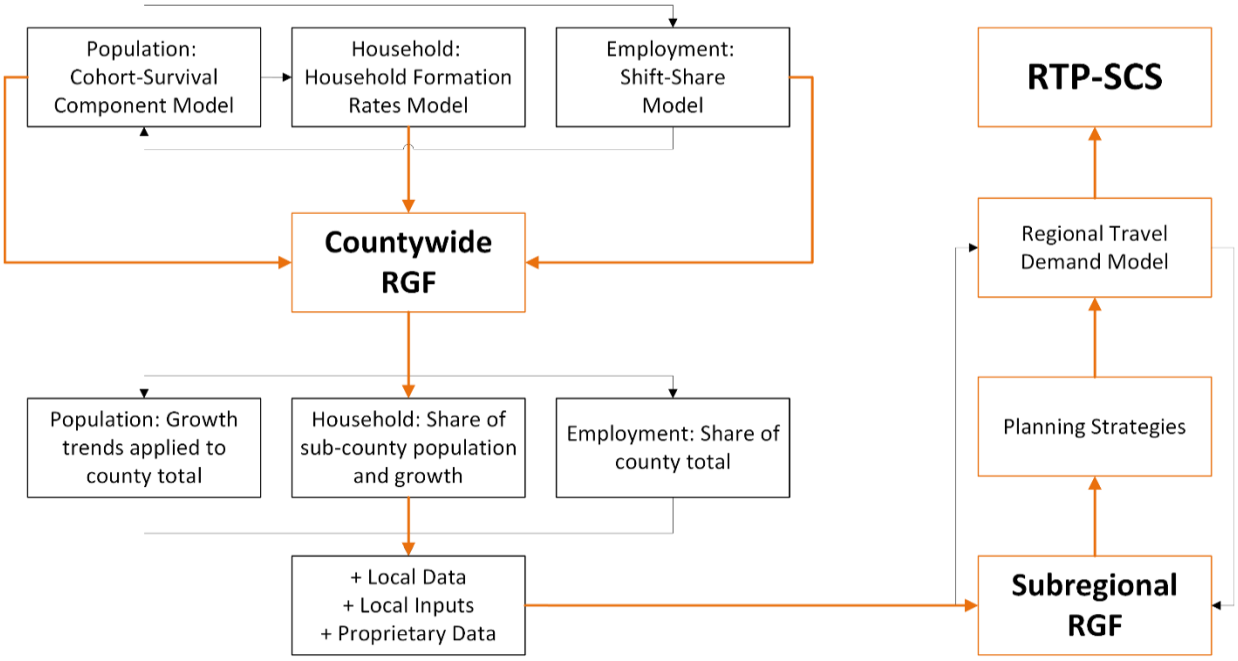
The Regional Growth Forecast ("2025 RGF") will provide updated, locally informed estimates of population, household, and employment growth between 2025 and 2060 for Santa Barbara County and its jurisdictions. These forecasts support long-range transportation planning, land use modeling, Regional Housing Needs Assessment (RHNA) allocations, California Environmental Quality Act (CEQA) analysis, and development of the Regional Transportation Plan-Sustainable Communities Strategy (RTP-SCS), as required by Senate Bill (SB) 375. As with any long-range forecast, the RGF is based on assumptions that are subject to uncertainty. The 2025 RGF updating process should occur every four years to align with the RTP-SCS development.

Purpose

This technical appendix is a critical component of the 2025 RTP-SCS RGF updating process—it includes the detailed process, methodology, and analysis. As discussed during the Technical Planning Advisory Committee (TPAC) meeting in September 2025, the first step in the process was to develop the initial countywide growth forecasts that include population, households, and employment. SBCAG's effort in identifying best practices in the process had suggested the following commonly used models:

- Cohort-Survival Component Model for Population
- Household Formation Rates Model for Households
- Shift-Share Model for Employment

Figure 1. 2025 Regional Growth Forecast Process

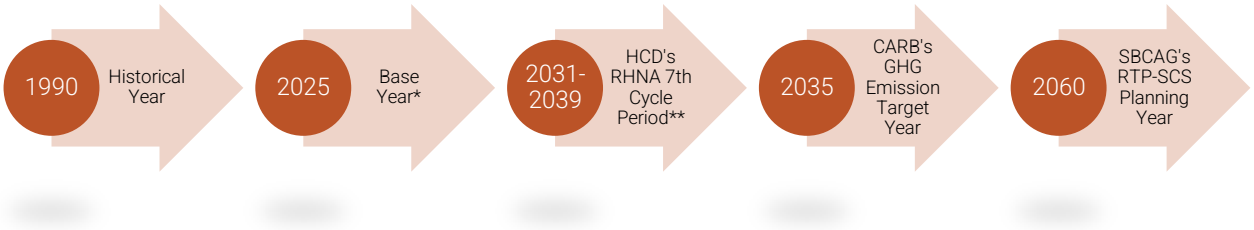


The above diagram illustrates a holistic view of the 2025 RGF updating process and how it is integrated into the RTP-SCS. The entire process of producing a growth forecast is a combination of a bottom-up (i.e., local input) and top-down (i.e., authoritative sources) approach. Once the 2025 RGF estimates are finalized, they will be further imported into land use and travel demand models at the Transportation Analysis Zone (TAZ), combined with planning strategies, to estimate the optimal growth strategies for the RTP-SCS for the purpose of improving the quality of life (e.g., air quality) for the residents within Santa Barbara County.

In addition, the forecast will serve as an input into the State Department of Housing and Community Development (HCD) RHNA for the 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).

The models have to consider historical and horizon years by considering important planning requirements set forth by the state and federal guidelines. The following years should be included in the projection:

Figure 2. 2025 RGF Planning Horizon and Key Milestone Years



Notes: *Although the base year is 2025, it's important to note that some data may not be available in 2025; **The next RHNA period is anticipated between 2031 and 2039; California Air Resources Board (CARB)

Strategies

There were several options staff considered in developing the forecast models. Due to a great partnership, the first option was explored by examining the Southern California Association of Governments (SCAG)'s cohort-component model. Model development requires extensive knowledge of demographics to properly develop a sound model with accurate data inputs and future assumptions (e.g., fertility, mortality, migration, etc.). For the SBCAG region, it is important to be efficient and consistent with the available authoritative data and resources provided by the state agencies, such as the Census, California Department of Finance (DOF), California Employment Development Department (EDD), and California Department of Transportation (Caltrans). SBCAG acquired historical employment data from EDD and projections from Dr. Mark

Schniepp to assist with forecast model development. Dr. Schniepp an accomplished economist and a former University of California, Santa Barbara (UCSB) professor whose work through the California Economic Forecast (CEF) has informed economic projections used by Caltrans.

Staff evaluated and developed a set of guiding principles to guide the 2025 RGF updating process:

1. Consistent with SBCAG's 2019 RGF, DOF, Caltrans CEF, EDD, and Census
2. Consider HCD's RHNA 6th cycle
3. Consider feedback and knowledge from TPAC members

Engagement

To have a meaningful collaborative process, since the start of the updating process in June 2025, 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. Four presentations were made to inform the Subregional Planning Committee on the overall process and potential feedback.

As mentioned with the bottom-up approach, the 2025 RGF updating process also introduced the Local Input Process (LIP) to foster a collaborative and opportunistic environment for local jurisdictions to review and provide input on the growth projections. 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. LIP was initiated after the first iteration of the process. Each jurisdiction was provided with a customized packet containing:

- Historical trends (1990–2024) for POP and HH
- Preliminary forecast estimates (2025–2060) for POP, HH, and EMP
- A summary of methodology and data sources

Jurisdictions were encouraged to review the projections and provide input related to:

- Major development projects in the pipeline (e.g., residential, commercial, etc.)
- Major planned land use changes and development agreements (e.g., entitlements, etc.)
- Local constraints or growth-related policies

Methodology and Results

This section provides detailed information on the 2025 RGF methodology and results. It also includes a section on the existing conditions analysis of population, households, and employment.

Existing Conditions Analysis

To understand how the region would grow, it is important to investigate how the region has grown. The tables below provide a comparison of historical and projected growth using authoritative sources:

Table 1. Historical Population Growth (%)

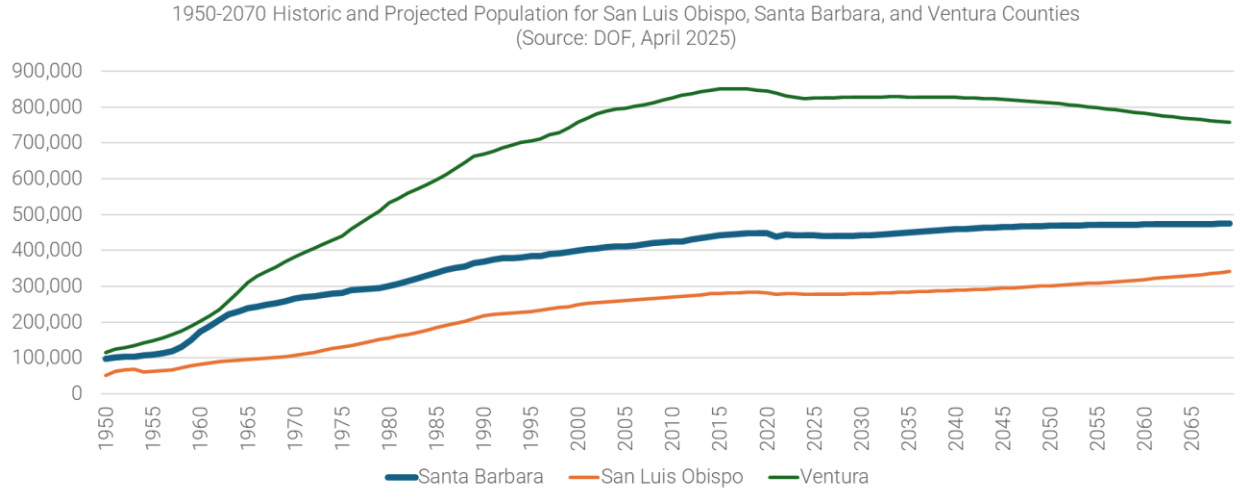
Historical Population Growth (%)	
Decade	Population (DOF)
1990–2000	8.4%
2000–2010	6.1%
2010–2020	5.5%
Annual Growth Rate 1990–2020	0.6%

Table 2. Projected Population Growth (%)

Projected Population Growth (%)			
Decade	SBCAG (2019)	Caltrans (2023)	DOF (2025)
2020–2030	6.3%	0.4%	-1.3%
2030–2040	4.8%	1.1%	3.9%
2040–2050	1.6%	-0.6%	2.1%
2050–2060	—	—	0.8%
2060–2070	—	—	0.4%
Annual Growth Rate 2020–2050	0.41%	0.03%	0.15%

The region's population growth has been slowly declining in the last three decades—this trend is consistent at the national and state levels. That slower growth is carried on into Caltrans and DOF projections. The table below shows the historical and projected population for the San Luis Obispo, Santa Barbara, and Ventura Counties, released by DOF.

Figure 3. 1950-2070 Historic and Projected Population for Central Coast Counties



The Cohort-Survival Component model's fundamental variables include births, deaths, migration patterns, and group quarters to estimate and forecast the total population for a given geography. These variables were obtained from various authoritative sources and utilized to understand the

existing socioeconomic conditions and potential demand of the region. According to DOF, the equation below provides a high-level explanation of how the population is estimated[1]:

$$Current\ Population = Previous\ Population + (Births - Deaths) + Net\ Migration$$

Natural Increase

Natural increase is a combination of births (fertility) and deaths (mortality). To estimate fertility, the age-specific fertility rates are needed. Same for estimating mortality, the age-specific survival rates are needed[2]. The estimates are grouped by five-year age cohorts (i.e., 0-4, 5-9, 10-14, 15-19, 20-24, 25-29, 30-34, 35-39, 40-44, 45-49).

Fertility

Fertility rate is one of the most important indicators to estimate and project population growth. The cohort-survival component model starts out by calculating births by using the Age-Specific Fertility Rate (ASFR), which "measures the annual number of births to women in a specific age cohort…per 1,000 women in that cohort.[3] As indicated in the existing trends analysis, women are giving birth at an older age cohort (30-39) in 2024 as compared to younger age cohorts (20-25) in 2000. Furthermore, the Total Fertility Rate (TFR) provides a holistic view of how many children a woman would have "…if she instantaneously progressed through all childbearing years with the given ASFR at each age."[4] The childbearing years are typically between the ages of 15 and 49. TFR is also known as the "replacement rate" when discussing population growth, referring to the rate needed to maintain the current population size.

DOF employed a complex spatial Poisson model combined with comprehensive births and deaths data from the California Department of Public Health to calculate fertility rates for females by age cohorts tailored for each county in California.[5] To estimate the projected births, the model considered mainly the projected female population and fertility rates by age cohorts. Children of male sex have a higher probability than children of female sex (i.e., 105 males per 100 females) in the projected births formula, according to DOF and CSU San Jose[6]. The formula for projecting births is shown below:

$$Projected\ Births_{age,year} = ASFR_{age,year} * Female\ Population_{age,year}$$

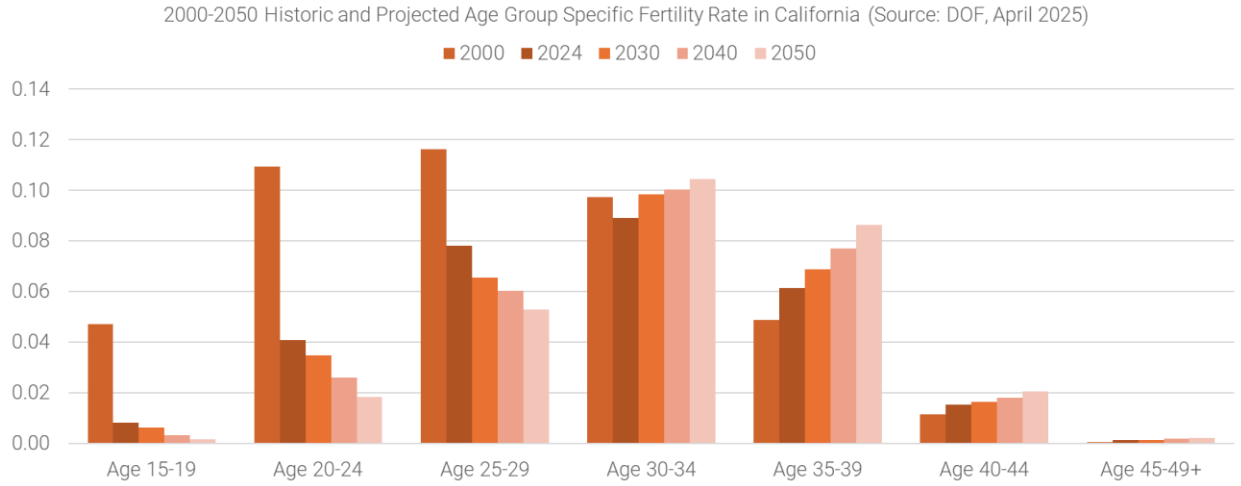
$$(ASFR)\ Fertility\ Rate_{age,year} = \frac{Number\ of\ Births_{age,year}}{Female\ Population_{age,year}}$$

Where age is the age cohort, and year is the year of the projection.

[1] California Department of Finance. Demographic Research Unit. 2024. State And County Population Projections 2020-2070 [computer file]. Sacramento: California Department of Finance. September 2024.
[2] https://www.sjsu.edu/faculty/watkins/cohort.htm
[3] https://budgetmodel.wharton.upenn.edu/issues/2022/7/8/measuring-fertility-in-the-united-states
[4] https://dhsprogram.com/data/Guide-to-DHS-Statistics/Current_Fertility.htm
[5] https://dof.ca.gov/wp-content/uploads/sites/352/2023/07/Methodology_Report.pdf
[6] https://www.sjsu.edu/faculty/watkins/sexratio.htm

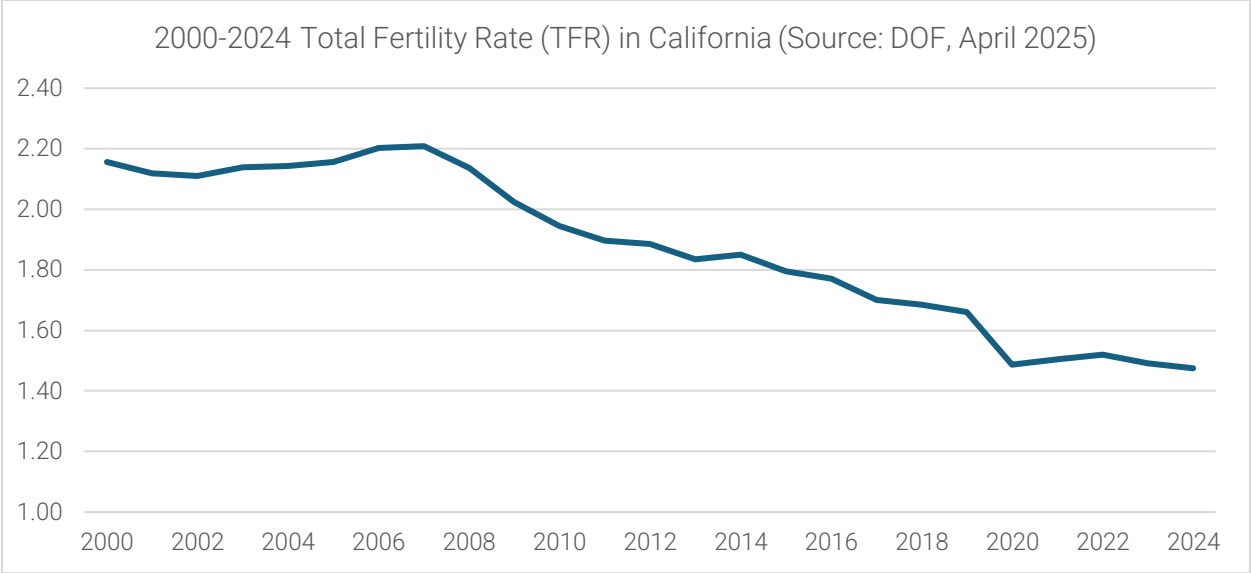
The table below shows the 2000-2050 Historic and Projected Age Group Specific Fertility Rate in California:

Figure 4. 2000-2050 Historic and Projected Age Group Specific Fertility Rate in California



The Report P-B file published by DOF provides births by mother's age, ASFR, TFR, and total births for California and its Counties**.** As indicated in the existing trends analysis, California's population growth has been declining over the years as women are having fewer children. The table below provides the TFR in California:

Figure 5. 2000-2024 Total Fertility Rate (TFR) in California



The global pandemic in 2020 had negatively impacted both ASFR and TFR, which further exacerbated the population decline. The California Department of Public Health releases Live Birth Profiles by ZIP code for California in the California Health and Human Services Open Data Portal.[7] The dataset contains counts of live births to California residents regardless of place of

[7] https://data.chhs.ca.gov/dataset/cdph_live-birth-by-zip-code

birth.[8] The County of Santa Barbara Public Health Department also published the Santa Barbara County Birth Brief, which provides detailed statistics related to birth, such as fertility rates and the number of births by race/ethnicity.[9] TFR can be calculated in the formula below. Note that the ASFRs are the sum of all seven five-year-old age cohorts.

$$Total\ Fertility\ Rate\ (TFR) = \ ASFR_{ij} * 5$$

Where 5 is the age group. If the age group is 10 (e.g., 15-24, 25-34, 35-44, etc.), replace 5 with 10.

The Centers for Disease Control and Prevention (CDC) is another resource to obtain detailed fertility data by age and race/ethnicity to calculate the fertility rates in the model.[10] Combining it with the DOF and CDC datasets, the model can develop the base year ASFRs as shown below:

Table 3. 2019-2023 5-Year Estimates Fertility Rates in the Central Coast Region

2019-2023 5-Year Estimates Fertility Rates in the Central Coast Region*
(Sources: DOF, 2025; CDC, 2025)

Age of Mother	Hispanic	NH American Indian or Alaska Native	NH Asian	NH Black or African American	NH Native Hawaiian or Other Pacific Islander	NH White	NH 2+ Races
15-19	0.0218	0.0049	0.0009	0.0030	0.0057	0.0020	0.0025
20-24	0.0671	0.0239	0.0046	0.0253	0.0280	0.0129	0.0138
25-29	0.1075	0.0331	0.0383	0.0472	0.0595	0.0576	0.0545
30-34	0.1106	0.0443	0.0901	0.0615	0.0536	0.1087	0.0937
35-39	0.0644	0.0272	0.0618	0.0510	0.0424	0.0685	0.0635
40-44	0.0164	0.0070	0.0158	0.0148	0.0109	0.0157	0.0147
45-49	0.0016	0.0049	0.0015	0.0015	0.0057	0.0015	0.0014
TFR	**1.947**	**0.705**	**1.065**	**1.021**	**1.005**	**1.334**	**1.220**

*Due to data availability, San Luis Obispo, Santa Barbara, and Ventura Counties are combined.

Mortality

CDC also provides detailed data on mortality by age, gender, and race/ethnicity. Combined with the data from the Social Security Administration (SSA), the mortality rates for residents who are older than 85 years of age can be estimated.[11] The mortality information in the region is analyzed in the next section.

Net Migration

Net migration is another crucial indicator to determine the number of people moving in and out by different types (i.e., domestic, international). Santa Barbara County is a desirable place to live

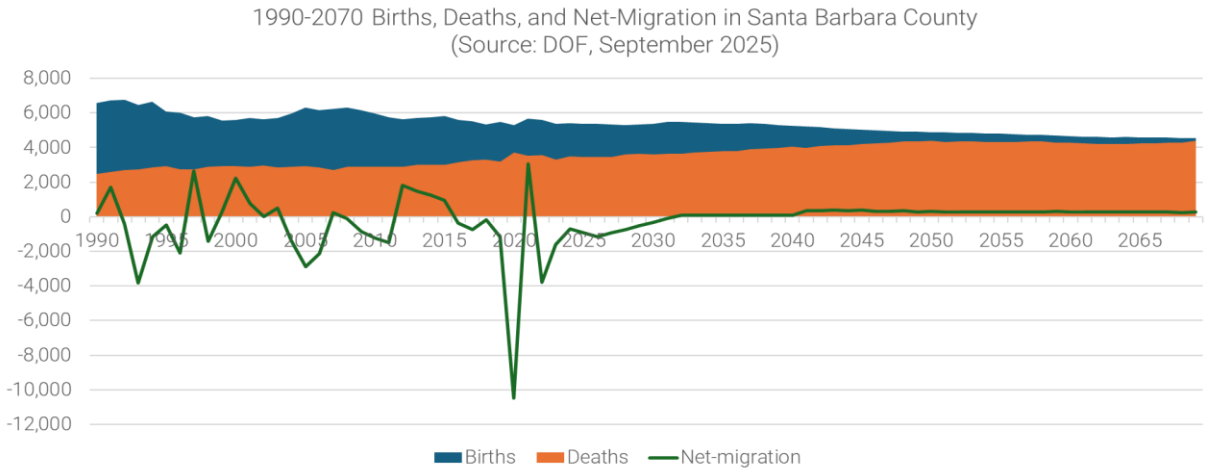
[8] California Department of Public Health. Birth Statistical Master File (Static), 1960-2023. Compiled by Center for Health Statistics and Informatics.
[9] https://www.countyofsb.org/1608/Data-Reports-Statistics
[10] https://wonder.cdc.gov/
[11] https://www.ssa.gov/oact/STATS/table4c6.html

and is home to several renowned colleges and large employers. These are some of the factors that impact the migration patterns in the region.

International and Domestic Migration

There are two types of domestic migration: people moving in and people moving out. Combined with immigration, DOF provides the historical and projected net-migration numbers for the region. The migration pattern has been fluctuating with negative growth between 1990 and 2024; however, there are higher numbers of immigrant arrivals and departures. On average, around 1,300 immigrants are added annually and around 1,900 migrants are lost annually. This trend is assumed to continue.

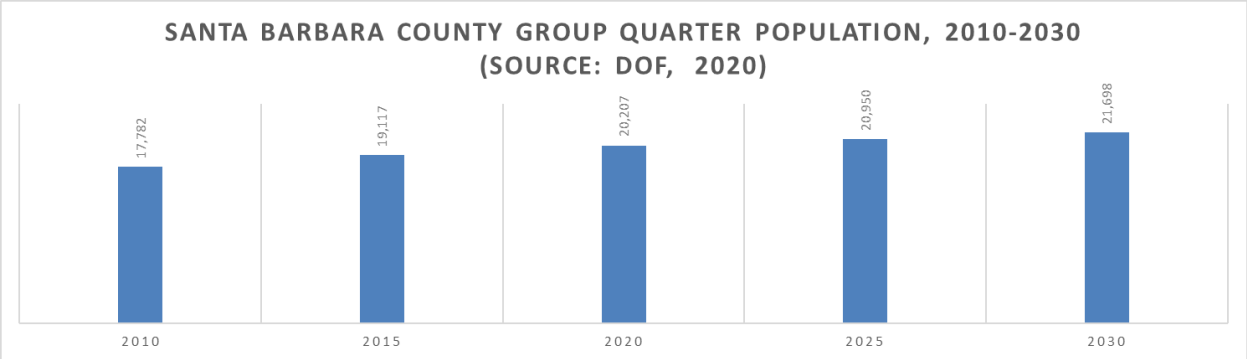
Figure 6. 1990-2070 Births, Deaths, and Net-Migration in Santa Barbara County



Group Quarters Population

The group quarters (GQ) population, people who live in facilities such as UCSB dormitories, Vandenberg Space Force Base (VSFB) housing, skilled nursing facilities, and correctional institutions, represents a small but significant subset of Santa Barbara County's total population. According to DOF 2010-2030 projections, the County's GQ population grew from 17,782 residents in 2010 to 20,207 in 2020, an increase of about 14 percent in ten years. DOF projects a continued but slower growth from GQ populations, reaching 20,950 by 2025 and 21,698 by 2030. This keeps GQ residents at approximately four to five percent of the total projected population.

Figure 7. Santa Barbara County Group Quarter Population, 2010-2030



Several planned institutional and university housing projects are expected to influence future GQ estimates. UCSB currently has two major student housing projects in the works: the San Benito Housing Project (approximately 2,224 beds, expected occupancy Fall 2027) and the East Campus Housing Project (approximately 1,276 beds proposed, anticipated occupancy Fall 2028). The university has also planned for expanded Faculty & Staff housing; however, that project is in the conceptual stage, and the proposed number of beds/units has not been determined.

At this time, no major changes are anticipated in other GQ categories. VSFB is not planning additional on-base housing, and the County's correctional facilities and skilled nursing centers are not planning substantial expansions. While the County is expected to expand the North County Branch Jail, the County is expected to decrease capacity at the South County Main Jail. Staff will continue to monitor any new or expanded facilities. The DOF GQ projections and the E-5 Table were selected as the guiding source for GQ estimates as they provide a consistent county- and jurisdiction-level framework, which aligns with the State and County level population forecasts.

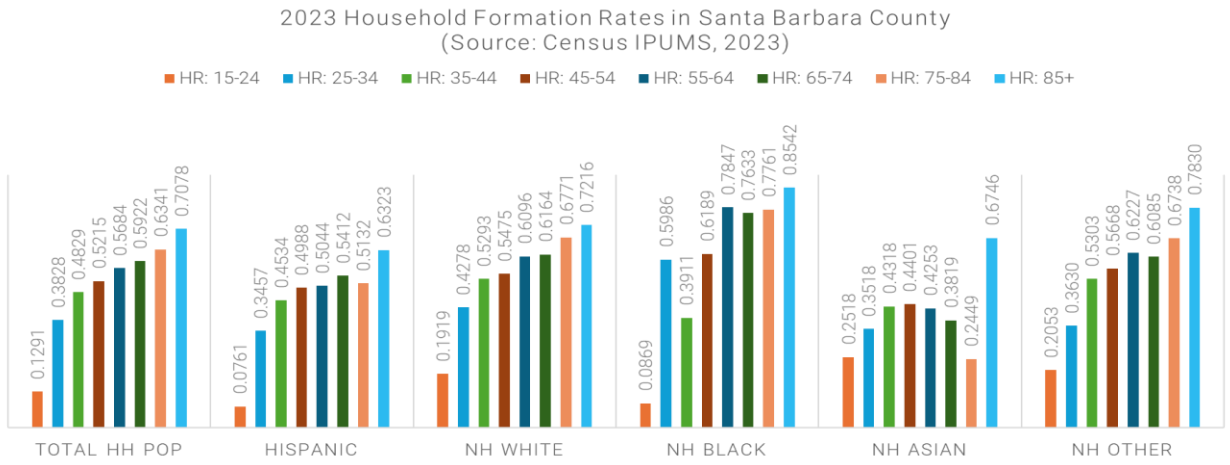
Household Formation Model

The household formation rates, or also known as headship rates, are critical to calculating the number of households by race/ethnicity and age cohorts based on population. The household population excludes the GQ population. New households require housing and are considered a proxy for new housing units.

Per the DOF P-4 Table on Household Projections for California Counties: 2020-2030, these rates determine "the probability of a member of each age group being a householder," which means the percent of people in a particular age group who head a household.

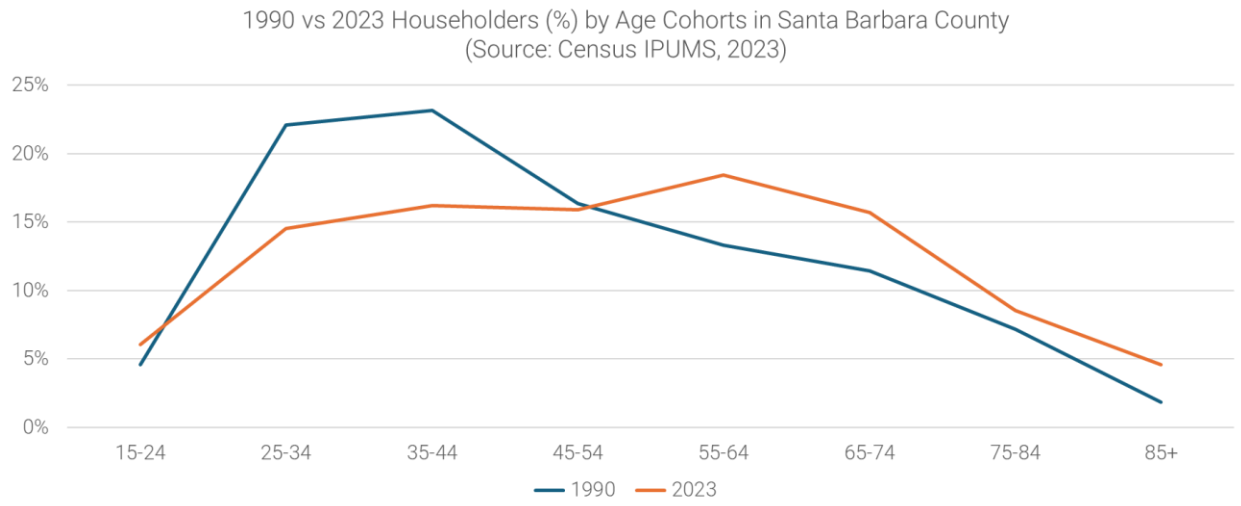
To complement the DOF assumptions, staff calculated county-specific household formation rates using recent Census Public Use Microdata Series (IPUMS) from the American Community Survey (ACS). The IPUMS dataset provides anonymized person-level responses that allow staff to identify householders by age group and estimate local headship rates consistent with DOF's methodology.

Figure 8. 2023 Household Formation Rates in Santa Barbara County



Overall, the likelihood of an adult heading a household has changed over the years, as older age groups are more likely to form a household, compared to younger age groups, across all race/ethnicity. This assumption is assumed to be consistent into the future. The graph below visualizes a comparison of the share of householders in different age groups between 1990 and 2023. It clearly shows that household formation has shifted from younger age groups to older age groups.

Figure 9. 1990 vs. 2023 Householders (%) by Age Cohorts in Santa Barbara County



Shift-Share Model

First, staff created two traditional shift-share models for Santa Barbara County covering 2014-2024—one benchmarked to the U.S. National Employment, and one to California Statewide Employment—to understand the existing employment conditions of the region. These models decompose employment change into three components: the National Share (NS) captures how much local growth can be attributed to overall expansion in the broader economy; the Industry Mix (IM) shows how much growth reflects national or statewide trends within each sector, and Competitive Share (CS) isolates the portion of job change explained by uniquely local factors.

Consistently positive CS (vs both benchmarks) in Farming, Health and Education, Leisure, Manufacturing, and Construction sectors, where the County outperformed what the greater trends alone would predict. By contrast, Transportation and Utilities, Professional Services, and Government sectors posted negative CS values despite positive state or national growth (IM > 0, CS < 0), suggesting local under-performance within otherwise expanding industries. Overall, Santa Barbara County's economic composition remains favorable: most sectors either matched or outpaced broader Statewide growth expectations.

Table 4. 2014-2024 Employment State-Based Shift-Share Model Results

2014-2024 Employment State-Based Shift-Share Model Results (Source: EDD QCEW)

Industry Sector	CS Rank	2014 Jobs (SB)	2024 Jobs (SB)	State Share (NS)	Industry Mix (IM)	Competitive Share (CS)	Jobs Change
Farm	**1**	21,000	29,800	3,157	(3,364)	9,007	8,800
(Private) Education and Health Services	**2**	25,100	32,200	3,774	5,802	(2,476)	7,100
Construction	**3**	7,400	10,300	1,113	1,491	296	2,900
Leisure	**4**	25,600	28,300	3,849	(78)	(1,071)	2,700
Financial Activities	**5**	6,400	7,000	962	(798)	436	600
Professional Services	**6**	23,600	24,100	3,548	(266)	(2,783)	500
Transportation, Utilities	**7**	3,300	3,600	496	1,442	(1,638)	300
Manufacturing	**8**	12,300	12,500	1,849	(1,987)	337	200
Information	**9**	4,200	3,900	631	(5)	(926)	(300)
Wholesale & Retail Trade	**10**	23,900	23,100	3,594	(4,158)	(236)	(800)
Government	**11**	38,300	35,500	5,759	(1,810)	(6,749)	(2,800)

2025 RGF Estimates – Countywide Level

This section discusses the technical processes, summary points, and assumptions based on authoritative sources and local inputs for population, households, and employment at the countywide level.

Modeling Process Overview

For the initial countywide population forecast based on DOF projections, the process is as follows:

- 1990-2024 historical population is from the DOF released in September 2025.
- Due to the projected decrease in births, an increase in deaths, and stagnant net migration, as well as the impacts of national policies, the population is forecasted to continue declining through 2030. After 2030, the population is expected to recover to the pre-pandemic levels and continue growing until 2060 at a modest rate.
- In-commute population
    - Historical and forecasted in-commute population is consistent with the 2019 RGF, with an increase of 1,400 in-commuters every five years, or 289 annually.
- GQ population
    - Historical GQ population from Census IPUMS.
    - 2025-2030 projected data is from the DOF P-4 and E-5 Table.
    - From 2025-2040, the GQ population is estimated by applying the 'pre-pandemic' (i.e., 2010, 2015, 2020) years' average percentages of the group quarters population.
    - Beyond 2040, the group quarters population is estimated by applying the same population annual growth rate (CAGR).

For the initial countywide household forecast based on DOF projections, below is the process:

- 1990-2023 historical households are from Census Decennial and 5-year estimates.
- 2025-2040 projected households are from DOF's Report P-4 Total Households for California Counties and E-5 Table released in November 2025.
- 2025-2040 period continues a household growth of 0.4 percent CAGR.
- Beyond 2040, household growth is proportional to population growth.

For the initial countywide employment forecast, below is the process:

- 1990-2024 reference Employment data comes from the Quarterly Census on Employment and Wages (QCEW), released by EDD.
- 2022-2032 projected employment data from EDD 10-year projections
- Beyond 2032, projected employment is estimated based on industry sector growth rates from Caltrans CEF.
    - Staff used the 2030-2050 CAGR for each industry to project change and extended these CAGRs into the 2050-2060 decade.
    - Staff flattened the Healthcare & Education employment projections from 2050 to 2060 to avoid overstating long-term gains. This adjustment prevents the compounding effect of applying the 2030–2050 CAGR beyond its reasonable horizon, as long-term demographic and labor trends suggest the rate of increase will moderate rather than continue exponentially towards 2060.
- Staff assumed Self-Employment rates will remain consistent and have historically been around seven percent of overall employment. To account for self-employment beyond 2032, staff assumed a seven percent rate of jobs overall.

Summary Points

Consistent with the guiding principles, staff produced the draft projected population, households, and employment based on historical and projected growth from authoritative sources (e.g., DOF, EDD, etc.). Overall, the growth patterns and assumptions are built upon the previously adopted 2019 RGF.

It is important to note that assumptions and trends in a forecast are subject to uncertainty and variations. Some variation related to structural economic changes related to technological advancements (e.g., automation, artificial intelligence, etc.) and social changes related to family formation, mortality, and fertility are likely to occur in the later years of the forecast. However, sudden disruptions such as natural disasters, economic recession, and geopolitics may occur at any given time during the forecasting horizon. Thus, it is good practice to continue updating trends and assumptions in a forecast periodically.

There are two important factors in ensuring a sound forecast—consistency and reasonableness. Staff calculated Population-to-Household (P/H) and Population-to-Employment (P/E) ratios to check the reasonableness of the forecast numbers with historical data.

Projection Comparisons

This section provides a comparison of countywide population and household projections based on pre- and post-LIP. 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. On the other hand, the projected population from DOF 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 reviews of housing assumptions and expected household growth, which is more focused on the General Plan capacity.

The tables below visualize population and household projections based on DOF-based, LIP-based, and 2019 RGF scenarios.

Figure 10. 2025 RGF Population Comparison

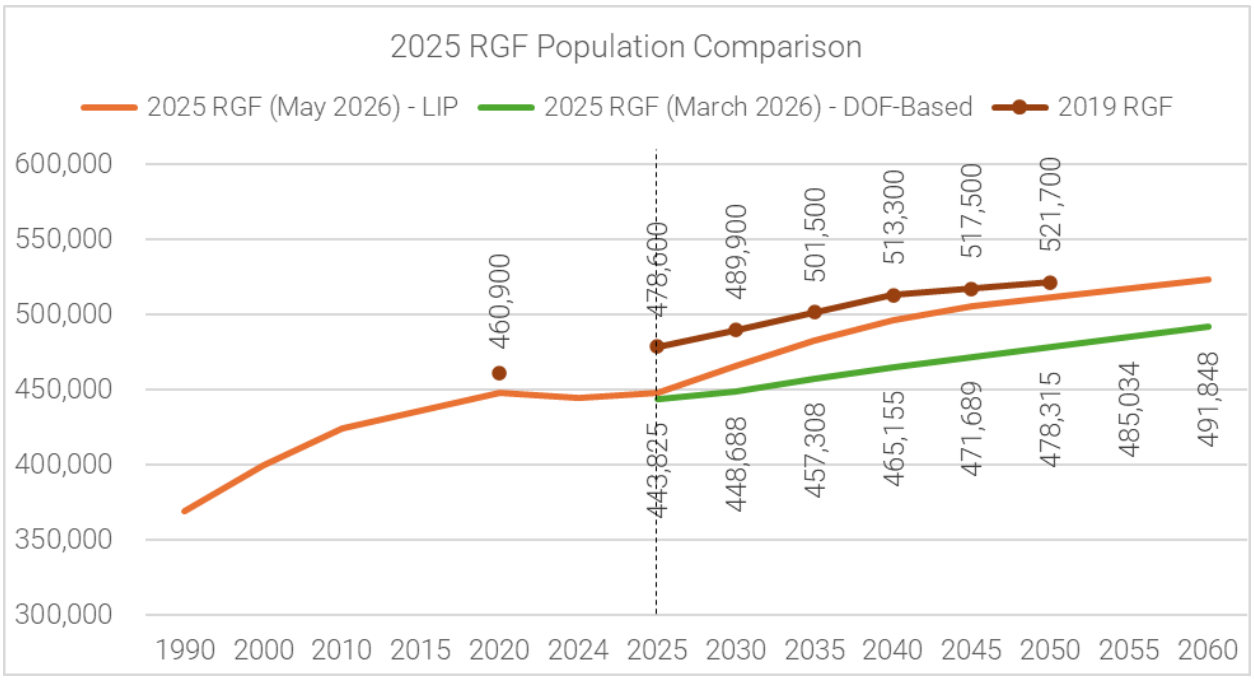
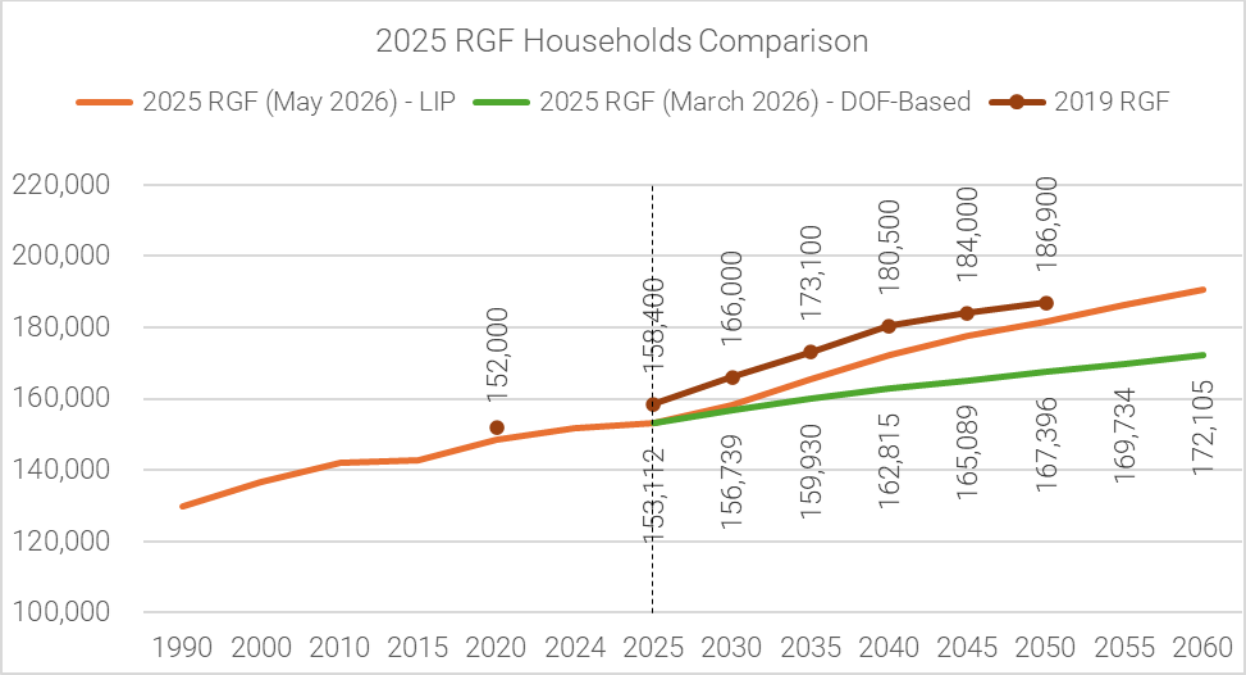
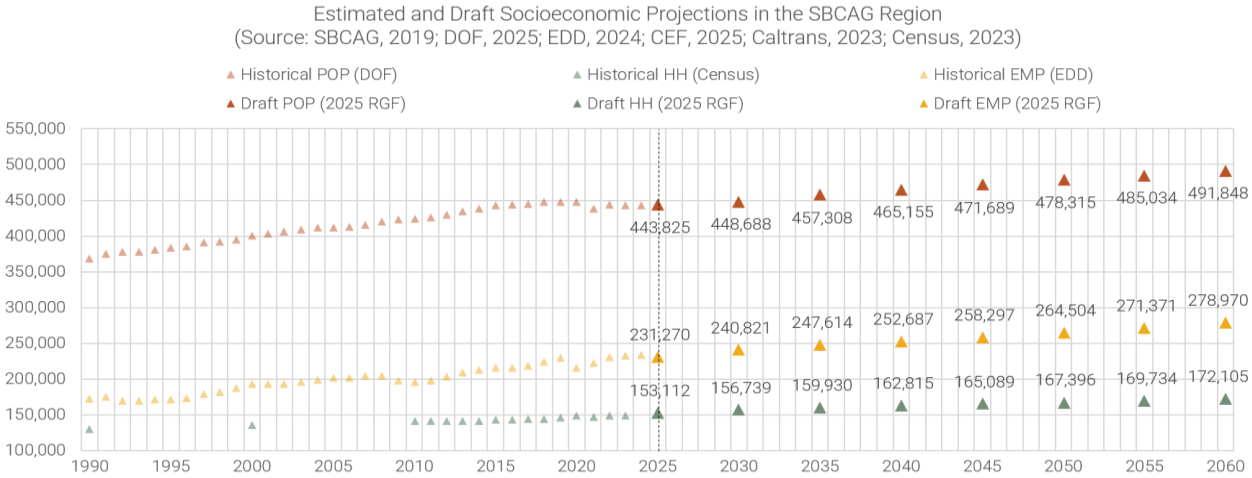


Figure 11. 2025 RGF Households Comparison



The table below shows draft historical estimates and projections (March 2026 version) in the region between 2025 and 2060:

Figure 12. Estimated and Draft Projections in the SBCAG Region, March 2026 Version



<u>1990-2020 Population:</u>
+78.5k, 21 percent
0.6 percent CAGR

<u>1990-2020 Households:</u>
+18.5k, 14 percent
0.4 percent CAGR
2.9 P/H Ratio

<u>1990-2024 Employment:</u>
+61k, 35 percent
0.9 percent CAGR
2.1 P/E Ratio

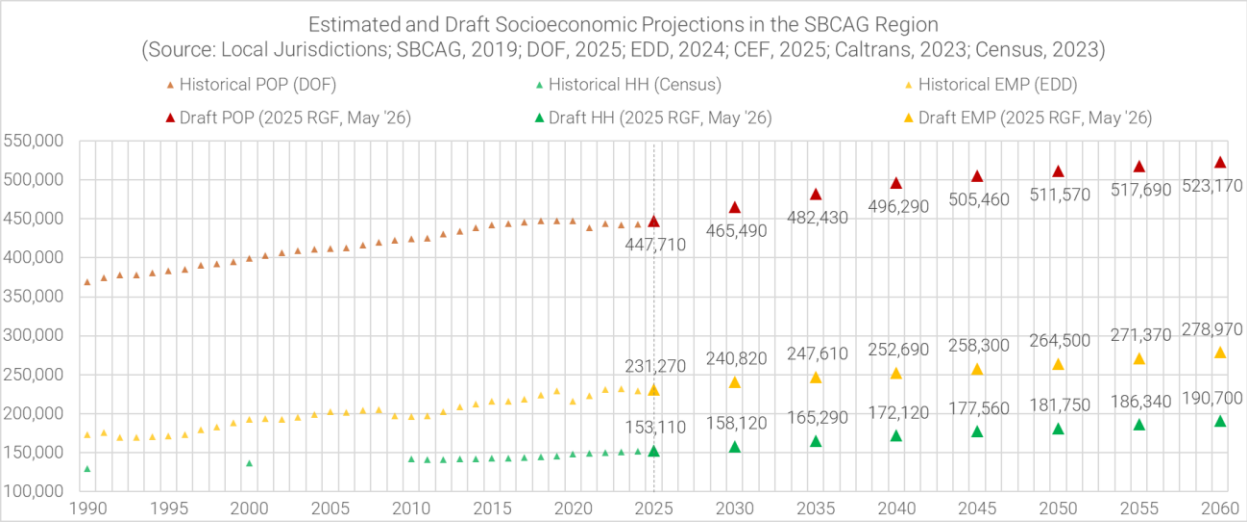
<u>2025-60 Population:</u>
+48k, 11 percent
0.3 percent CAGR

<u>2025-60 Households:</u>
+19k, 12 percent
0.3 percent CAGR
2.7 P/H Ratio

<u>2025-60 Employment:</u>
+42k, 17 percent
0.5 percent CAGR
1.8 P/E Ratio

After the release of the initial projections in March 2026, staff worked collaboratively to review and revise the projections based on feedback from local jurisdictions. The general feedback received was that the first iteration of the projections was too low and did not reflect local development activities. The table shows the revised projections released in May 2026.

Figure 13. Estimated and Draft Projections in the SBCAG Region, May 2026 Version



2025-60 Population:	2025-60 Households:	2025-60 Employment:
+75k, 17 percent	+38k, 25 percent	+48k, 21 percent
0.4 percent CAGR	0.6 percent CAGR	0.5 percent CAGR
	2.9 P/H Ratio	1.9 P/E Ratio

Population

- March 2026 Version
  - Growth Factors
    - The number of births is forecast to remain constant until 2060, with an estimated 5,000 births annually, due to young adults continuing to delay forming new households and having children.
    - The number of deaths is forecast to increase until 2060, with an estimated 4,000 deaths annually, as the Baby Boomers continue to age in mass.
    - Due to this phenomenon, the natural increase is forecast to decrease in the future, which will contribute negatively to the overall population growth.
    - Net migration is forecast to be negative from 2025 as people are leaving the county, most likely due to teleworking policies, cost of living, and housing affordability. By 2060, net migration is forecast to slightly increase to approximately 250 in-migrants annually.
    - School enrollment is also impacted by the slowdown in births, which is not forecast to increase significantly.
  - The region's population is projected to grow by approximately 48,000 (11 percent) between 2025 and 2060. This growth trend is consistent with DOF and the

previously adopted 2019 RGF due to low birth rates, low migration, and increasing mortality rates.
    - The region's population share of the state population has historically been declining from approximately 1.24 percent in 1990 to 1.13 percent in 2024. This pattern is forecasted to trend higher with the County's share of the state population at 1.2 percent by 2060. This is due to the projected decrease in population in California as mortality rates increase for Baby Boomers.
    - The county share of Hispanic origin population is estimated to increase from 50 percent in 2025 to 53 percent in 2060 while the Non-Hispanic White population is forecast to decrease in the future.
    - As the County is aging, the share of the elderly population who are age 65 and older is forecast to increase from 17 percent in 2025 to 21 percent in 2060. On the other hand, the share of the labor force population who are between 15 and 64 is forecast to slightly decrease from 65 percent in 2025 to 64 percent in 2060.
    - In-commuting patterns from people who live outside of the region and commute in are forecasted to continue increasing, which has an effect on population and employment growth.
    - The number of jobs has increased faster than the number of employed residents. The number of in-commuters has increased by more than double from approximately 5,000 in 1990 to 11,000 in 2010. This trend is assumed to continue increasing to about 25,000 in-commuters in 2060.
- May 2026
    - 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.

Households

- March 2026
    - Future household formation rates are influenced by the aging of the Baby Boomer generation as more single elderly households drive rates up, and, conversely, driving rates down are young adults as they delay household formation due to housing and other associated living costs.
    - Household growth is a proxy for housing unit demand as newly formed households require a housing unit, which is one of the main components in HCD's RHNA methodology.
    - Household growth approximates growth in the population. Countywide household growth was modest in 1990-2020, reaching approximately 18,500 households. The region's households are forecast to grow by about 19,000 (12 percent increase) between 2025 and 2060, which is slightly more than the 1990-2020 period.
    - The increase in household size or persons per household has the potential to increase population growth without the addition of new housing units. However,

the household size is forecasted to be smaller to be consistent with fewer births and an increase in the elderly population.

- May 2026
    - 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.

Employment

- At a high level, the region is an economic microcosm of the state and nation as a whole. Employment growth in Santa Barbara County has historically tracked state and national growth.
- Wage and Salary Employment growth in Santa Barbara County has trailed the state average since 1990 and is forecast to increase by approximately 37,000 (17 percent) jobs with an annual growth rate of 0.44 percent between 2024 and 2060.
- This employment forecast is consistent with the state's projections from EDD (the CA Employment Development Department), the California Economic Forecast Project, previous iterations of the Regional Growth Forecast, and (2025) projected population growth.
- The top five industry sectors in the County, starting from the top, are Education and Health Services, Leisure and Hospitality, Farming, Professional Services, and Wholesale and Retail Trade.
- There are three larger sectors where the region's share of total jobs is substantially different from the state—Farm, Healthcare and Social Assistance, and Leisure and Hospitality—due to the importance of agriculture, higher education, VSFB, and tourism.
- The county is home to a major UC campus that will attract high-wage job growth associated with campus activity. UCSB has a capped enrollment of around 25,000 students, and approximately 10,000 employees.
- Healthcare employment is expected to be one of the leading sectors in the labor market due to the aging population and the major healthcare employers—Cottage Health, Marian Regional Medical Center, and Sutter Health—with more than 5,000 employees.
- Job growth is forecast to grow approximately 0.7 percent annually from 2025-2030, 0.4 percent annually in the 2030-2040 and 2040-2050 periods, and 0.3 percent annually from 2050-2060.
- Employment is highly correlated with population growth patterns (r = 0.99). Correlation is strongest in the near term (2025-2030). Between 2030 and 2040, job growth mildly outpaces population growth, as the regional economy benefits from increased out-of-county commuters and projected sectoral gains, particularly in healthcare and education.

From 2050 onward, both employment and population grow slowly and in tandem, reflecting aging populations in the SBCAG region and neighboring counties.

There are three main authoritative sources that guide the employment forecast in the region, which are BLS, EDD, and Caltrans. At the same time, the forecast numbers must consider the guiding principles by which to make it consistent with population growth. BLS provides employment projections for the US up to 2034 by industry sector; EDD provides projections for California and Santa Barbara County up to 2032; and Caltrans Economic Forecast also provides employment and specific industry sector projections for the state and County up to 2050. Based on these robust projections, they are a great resource to consider to ensure the employment growth is within a reasonable assumption. Staff projected employment using a blended approach. First, staff developed two shift-share models to benchmark Santa Barbara County's historical industry performance relative to state and national trends. These models provided context for understanding which sectors have been locally competitive over time.

Building on that foundation, staff used the EDD 2022–2032 industry projections as the primary basis for near-term growth, supplemented by QCEW employment data through 2024. In order to incorporate the CEF projection data, and maintain consistency with the previous Growth Forecast, sectors were cross-correlated into the following industries: Construction, Farm, Financial Activities, Government, Health & Education, Information, Leisure, Manufacturing, Not Listed, Professional Services, Transportation & Utilities, Wholesale & Retail Trade.

After 2032, staff referred to the CEF projection data, applied the 2030-2050 compound annual growth rates (CAGRs) for each industry. To estimate self-employment, which is not reported in the CEF, staff assumed a 7 percent self-employment rate. This is consistent with the self-employment projections from EDD (7.6 percent in 2022, 7.3 percent in 2032).

From 2050-60, staff continued to apply the 2030-2050 CAGRs. Growth in the Health & Education sector was manually tapered by 0.1 percent per year from 2050 to 2060 to reflect continued, but moderate, growth. While the sector is expected to remain a major driver of regional employment, applying the 2030–2050 CAGR beyond its projection window would likely overstate long-term gains. The taper provides a more conservative trajectory consistent with slowing population growth and an aging workforce later in the forecast period. Countywide, employment is anticipated to grow approximately 20 percent between 2022 and 2060. Based on this forecast five fastest growing industries are Health & Education, Construction, Leisure, Information, and Manufacturing. All industries showed overall growth except for Financial Activities, Transportation & Utilities, and Wholesale & Retail Trade.

The initial employment projections were reviewed by Dr. Schneipp, and minor adjustments were made to the following categories based, in terms of projected employment versus the initial estimates: healthcare & (private) education (-2%), professional services (-1%), farming (+2%), government (+1%).

Table 5. Employment 2024 and Employment 2060 Comparison

Employment, 2024 (EDD QCEW Report)	Employment, 2060 (SBCAG Projections)
213, 370*	278,970

*Note: Self-Employment, Sole Proprietors, and members of the Armed Forces are not reported in QCEW data; for the purposes of analysis, staff assumes a 7 percent rate which would be approximately 16,060 jobs; totals are independently rounded.

Table 6. Employment by Sector, 2024 and 2060

Sector	Employment, 2024 (EDD QCEW)	Employment, 2060 (SBCAG)	% Growth
Farm	30,220	31,800	5.2%
Construction	10,390	12,240	17.8%
Manufacturing	12,420	13,680	10.1%
Wholesale & Retail Trade	22,950	20,840	-9.2%
Transportation, Utilities	4,020	4,160	3.5%
Information	3,780	4,050	7.1%
Financial Activities	6,710	6,880	2.5%
Professional Services	23,790	26,220	10.2%
Health & Education	30,400	63,740	109.7%
Leisure	28,420	32,590	14.7%
Government	33,480	36,090	7.8%
Not Listed	6,780	7,140	5.3%
Self-Employment	16,060	19,530	21.6%

2025 RGF Estimates – Subregional Level

The next step in the 2025 RGF process is to suballocate the countywide growth numbers to jurisdictions, individual unincorporated areas, and subregions. Each subarea requires a level of specificity. For the purpose of consistency, this section only reports the subregional growth forecast estimates based on inputs from local jurisdictions, which is the May 2026 version.

Modeling Process Overview

At the regional and local levels, the forecast 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. It is also a resource for social service agencies, marketing studies, and analysis of growth-related issues. The suballocation process consists of allocating the growth numbers between 2025 and 2060 to the eight incorporated cities (i.e., Buellton, Carpinteria, Goleta, Guadalupe, Lompoc, Santa Barbara, Santa Maria, Solvang), county unincorporated areas (e.g., Isla Vista, Montecito, Summerland, Orcutt, Cuyama Valley, Santa Ynez, Los Alamos, etc.), and county subregions (e.g., South Coast, North County, etc.).

The growth forecast suballocation process involves a combination of technical expertise and local input from local jurisdictions. The overall process has two phases: 1) population and households, and 2) employment. In addition to historical trends from the Census and 2019 RGF assumptions at the jurisdictional levels, household growth was considered relative housing demand using the 6th Cycle RHNA allocations, and population growth was calculated using the historical household size.

Employment by job sector was suballocated using EDD's 2024 QCEW data. This gave staff a recent, verified dataset on employer locations and industries throughout the County. Additionally, historical Census data was reviewed to confirm whether recent industry distribution patterns were consistent with longer-term trends. From there, the 2025-2060 Countywide employment control totals were distributed to individual geographies. Each jurisdiction received a portion of the 2060 sector total proportional to its observed share of that sector's employment in 2024. In some small geographies or industries with few establishments, QCEW data was suppressed to protect confidentiality. Where significant suppression occurs (such as Cuyama Valley, Buellton, Carpinteria, and Guadelupe), SBCAG will work with local jurisdictions to identify the likely industry classification of those jobs.

Another important component to ensuring the accuracy of subregional growth forecasts is LIP, where local jurisdictions have a chance to review and provide inputs on the growth estimates. SBCAG will share the draft subregional projections with each jurisdiction through individualized review packets. These packets will include detailed data tables and supporting information to allow local jurisdictions to review, comment on, and suggest refinements to the allocations. This may include known development projects, major employer changes, or other local factors not fully reflected in the base data.

Based on this feedback, staff will evaluate and incorporate adjustments into the subregional growth forecast estimates. Below are the high-level formulas describing the methodology to estimate the subregional growth forecast:

1. Household (HH) Projections
    1. Use RHNA 6th Cycle and historical HH from Census and DOF to estimate future household shares
    2. Apply countywide HH totals to the estimated HH shares
    3. Revise HH growth based on local inputs
2. Population (POP) Projections
    1. Use historical household size from Census ACS and DOF to estimate POP shares
    2. Apply countywide POP totals to the estimated POP shares
    3. Revise POP growth based on local inputs, updated household size, and updated group quarters POP
3. Employment (EMP) Projections
    1. Using EDD (QCEW)* data, calculate industry-specific job shares for each location
    2. Apply countywide EMP totals to the estimated EMP by industry shares
    3. Fill in suppressed employment data and account for planned employment projects based on local inputs

Subregional growth forecasts are presented on the next page.

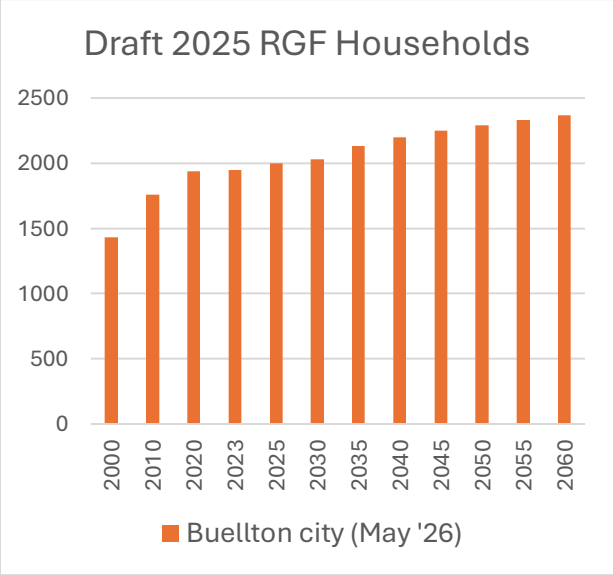
Subregional Households

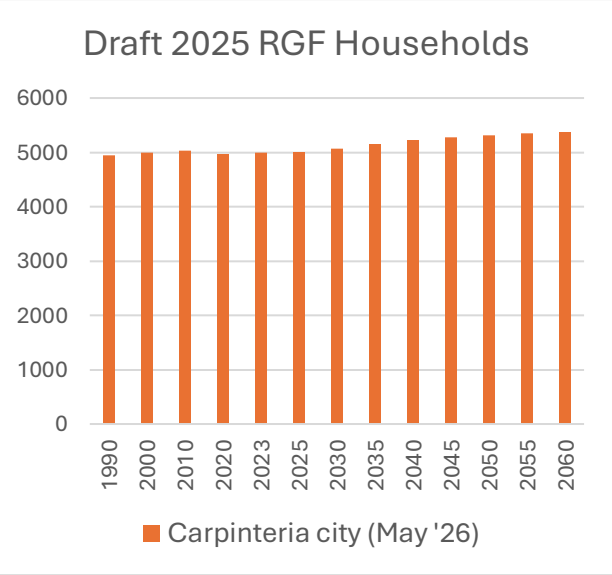
The places with the highest projected household growth are the City of Santa Maria (51%), the unincorporated Santa Maria Valley (39%), and the City of Lompoc (33%).

Table 7. Subregional Household Projections, 2025-2060

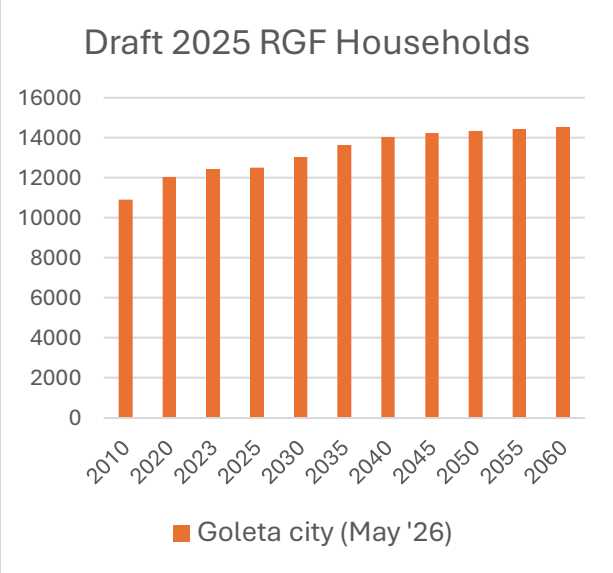
Geography	% Growth 2025-2060	2025	2030	2035	2040	2045	2050	2055	2060
Buellton city	18.6%	2,000	2,030	2,130	2,200	2,250	2,290	2,330	2,370
Carpinteria city	7.1%	5,010	5,070	5,160	5,230	5,280	5,320	5,350	5,370
Goleta city	16.1%	12,520	13,030	13,630	14,040	14,240	14,340	14,440	14,540
Guadalupe city	19.6%	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**

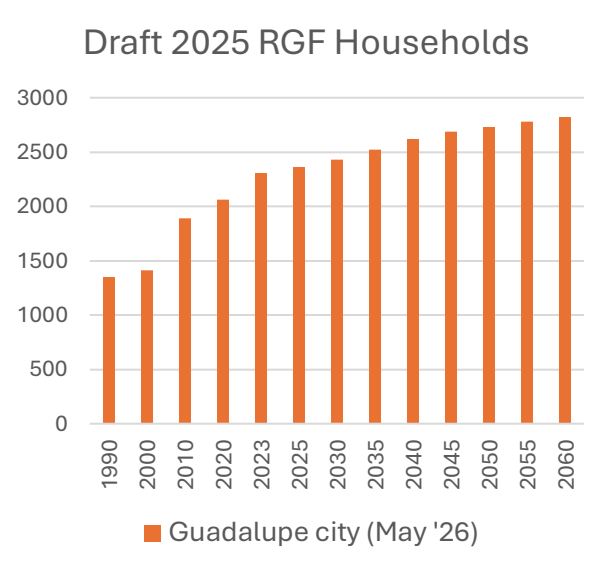
Figures 14 and 15.



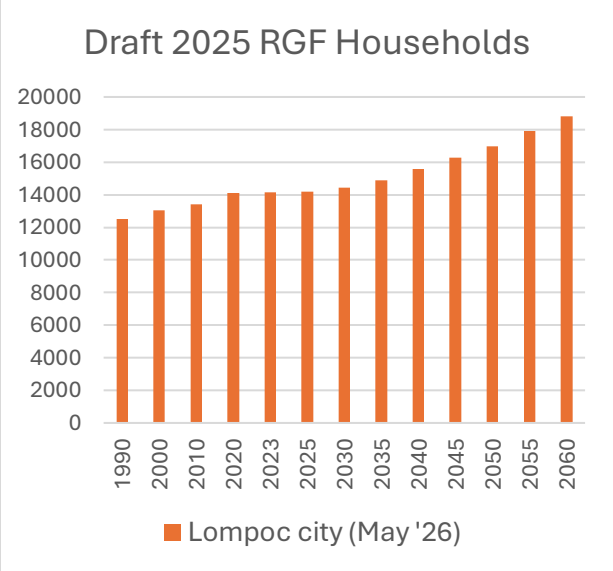


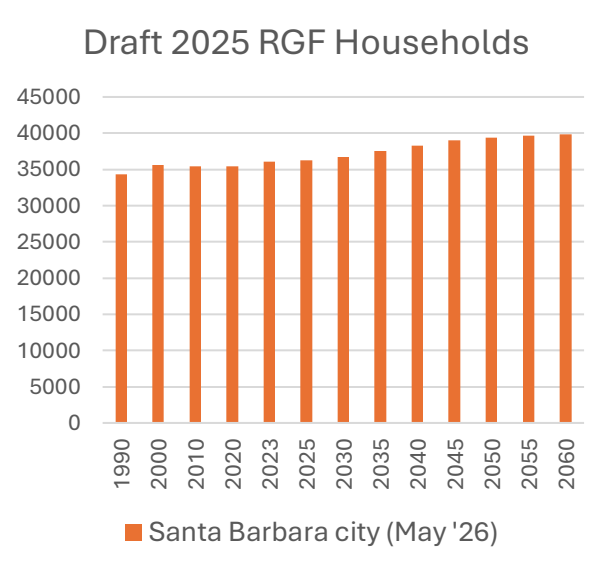
Figures 16 and 17.





Figures 18 and 19.





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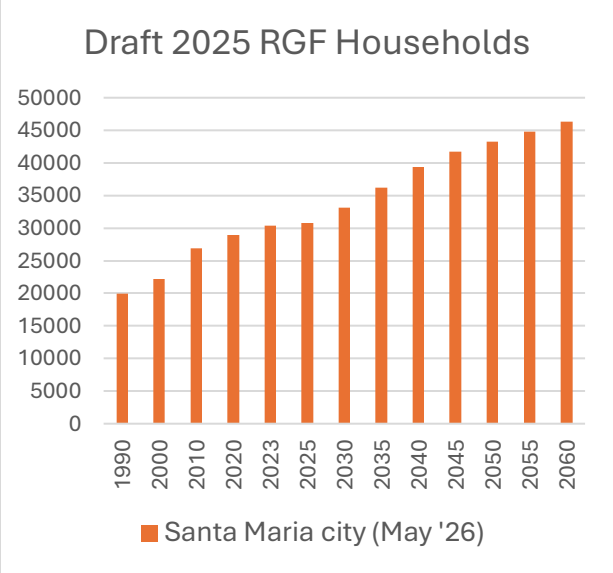


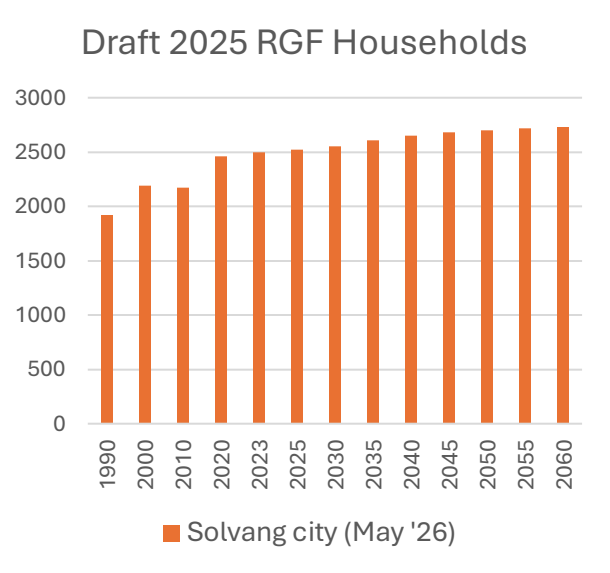
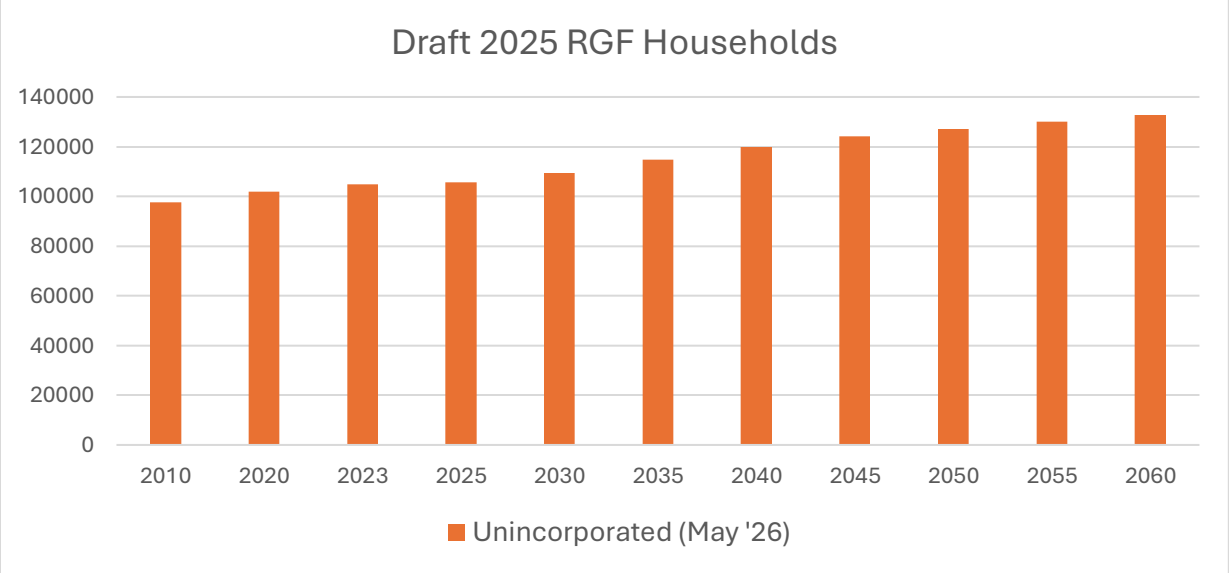


Figure 22.



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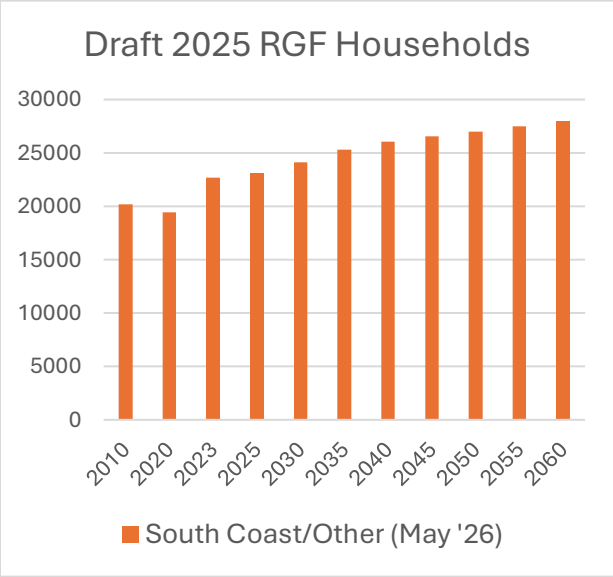

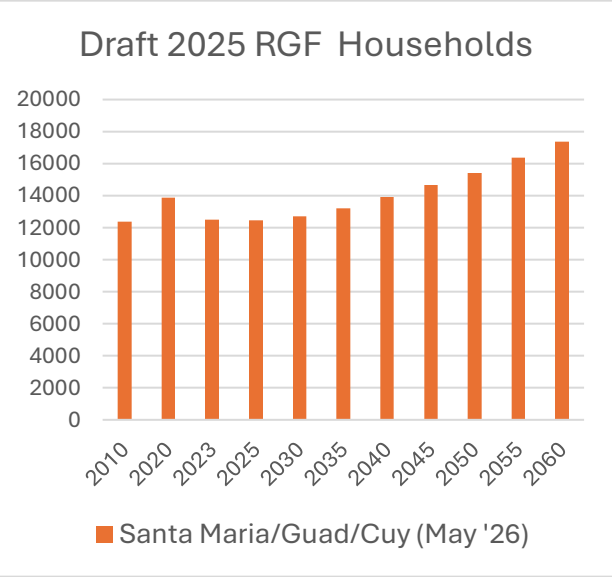

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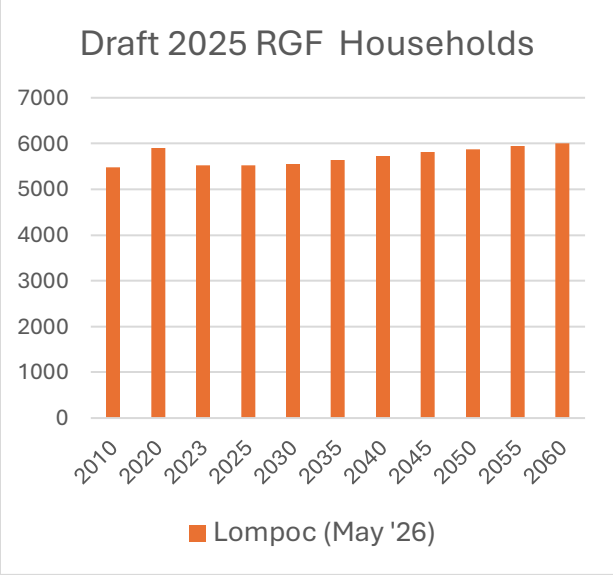
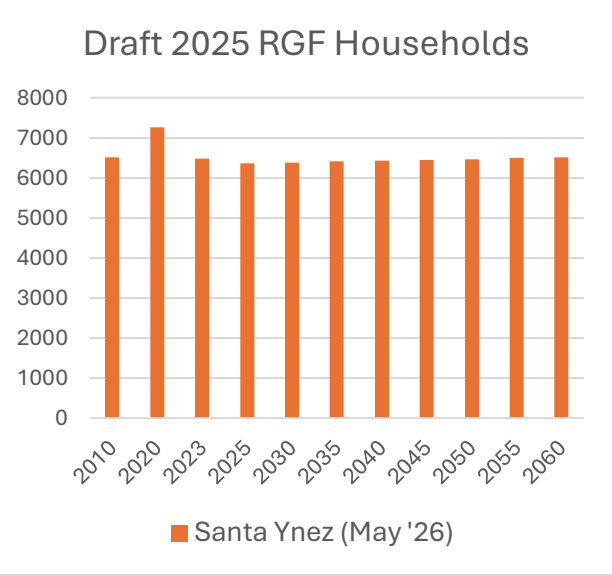




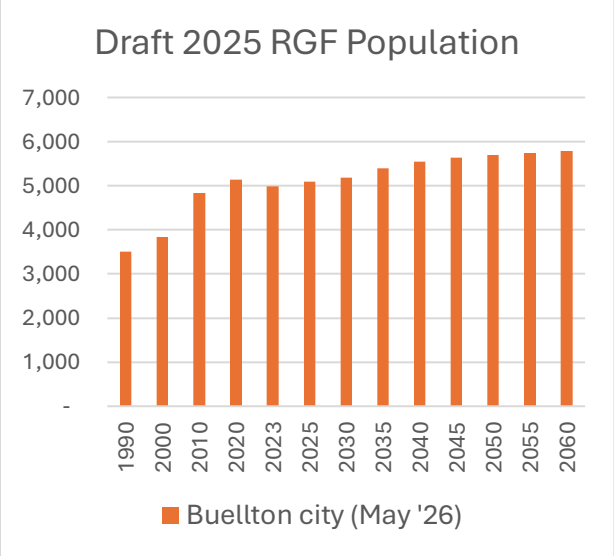
Subregional Population

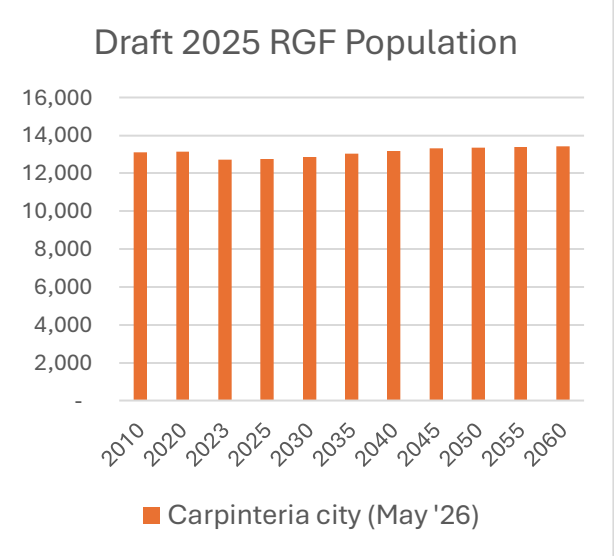
Population change varies across the county based on local conditions and capacity. The cities with the highest projected population growth are Santa Maria (29%), Lompoc (27%), and Goleta (16%).

Table 8. Subregional Population Projections, 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**

Figures 27 and 28.





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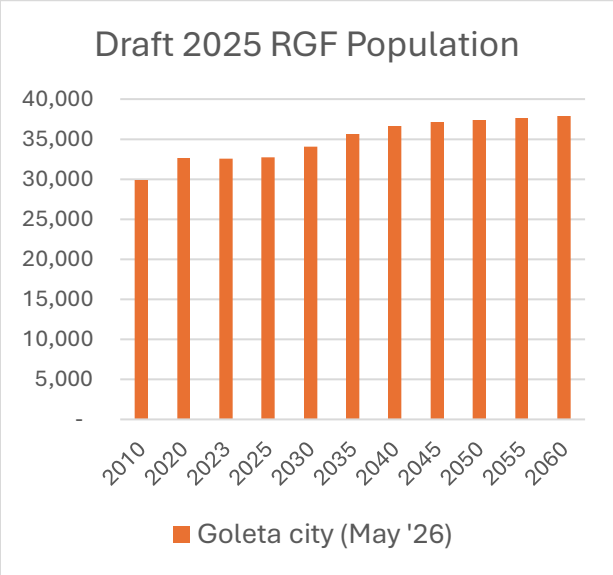

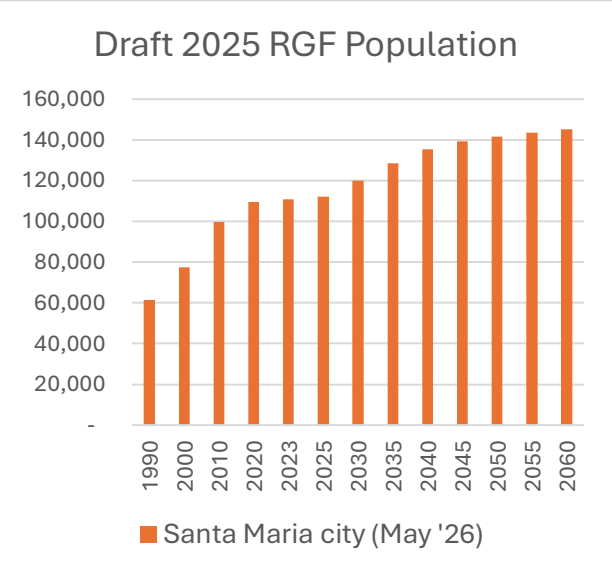

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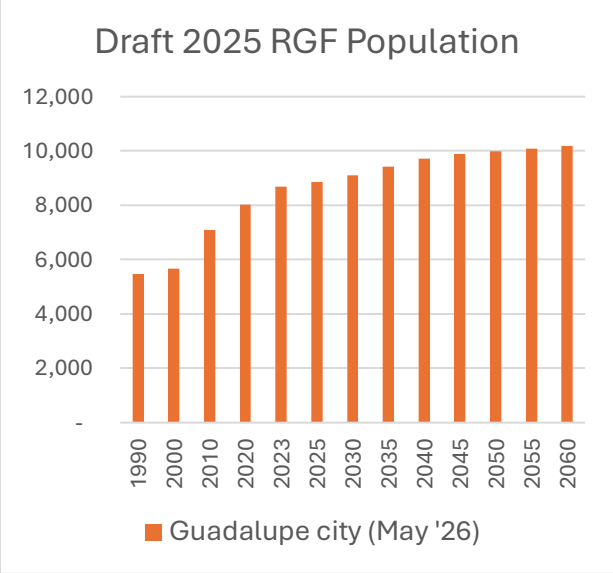
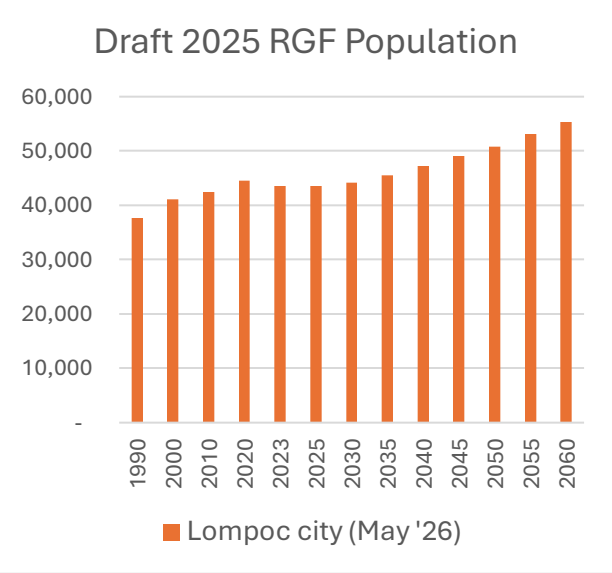
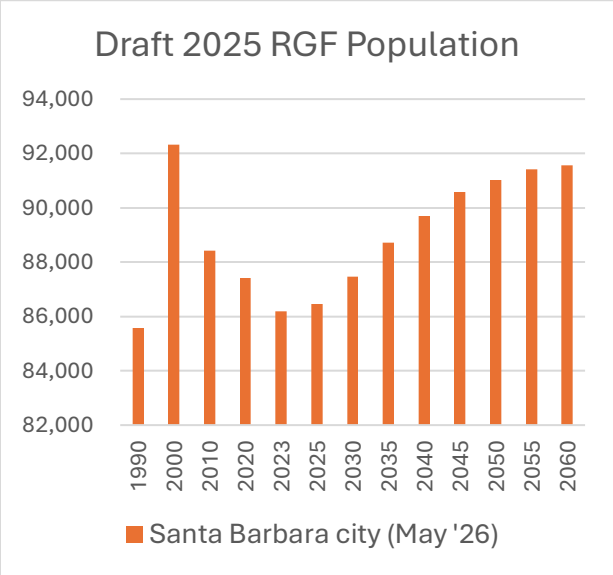




Figures 33 and 34.



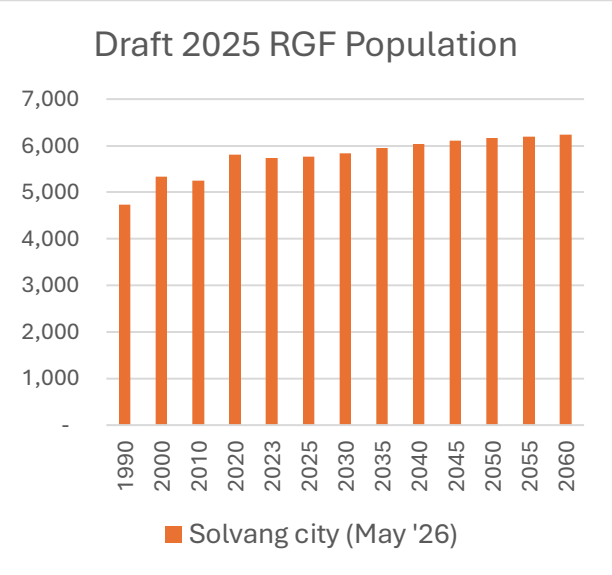
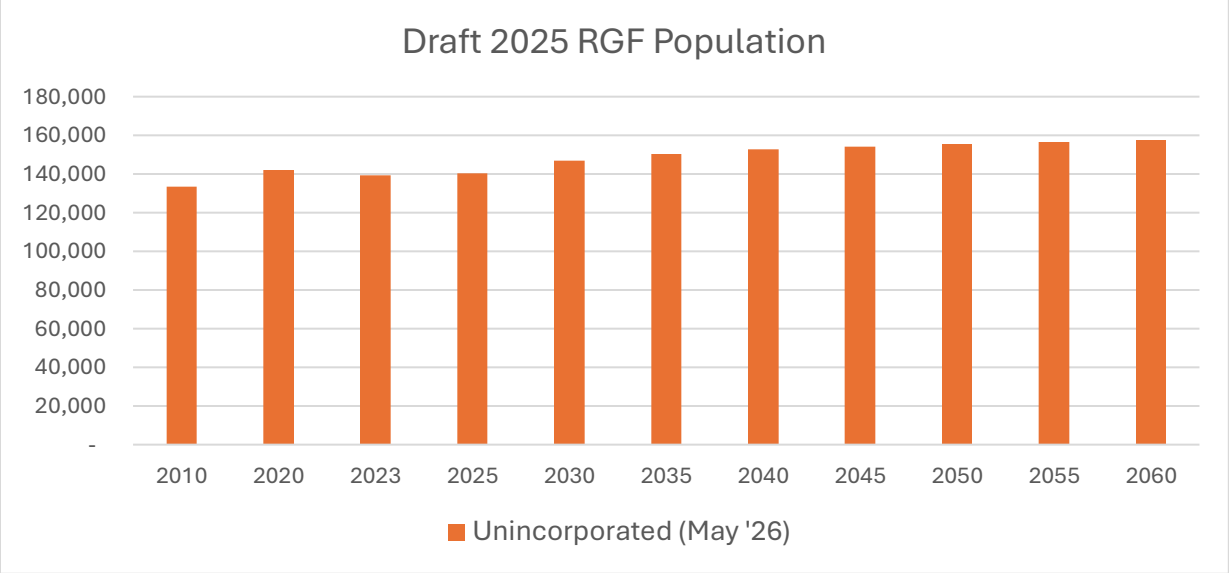
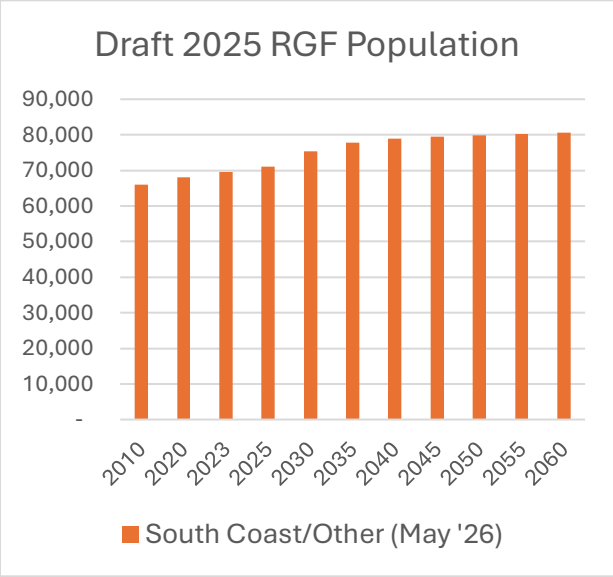
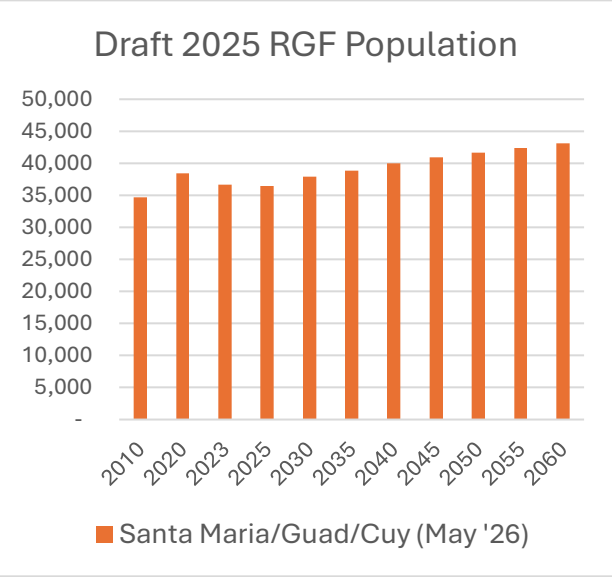


Figure 35.

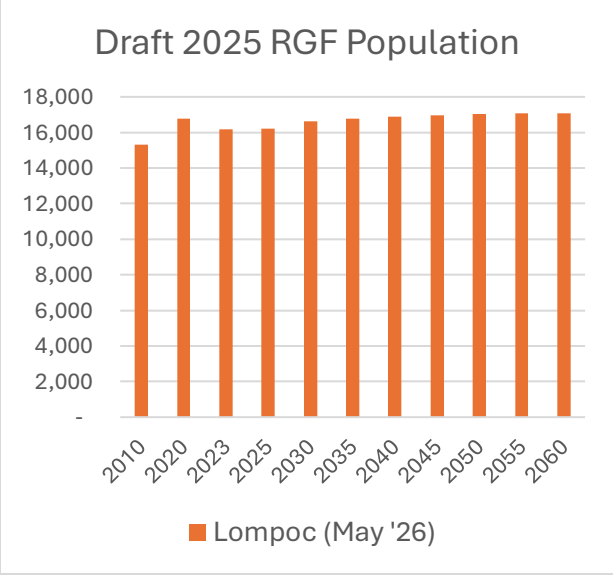


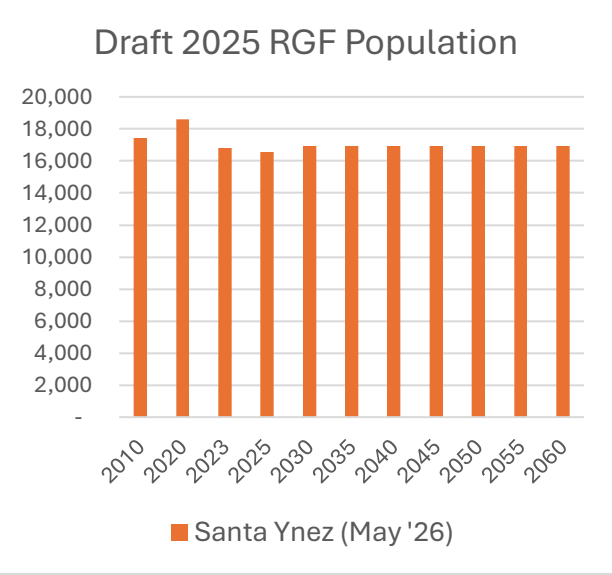
Figures 36 and 37.





Figures 38 and 39.





Subregional Employment

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).

Table 9. Subregional Employment Projections, 2024-2060

Geography	2024 Share	2060 Share	2024	2025	2030	2035	2040	2045	2050	2060
County Total	**100%**	**100%**	**229,430**	**231,270**	**240,820**	**247,610**	**252,690**	**258,300**	**264,500**	**278,970**
South Coast Total	**53.9%**	**54.6%**	**123,630**	**124,720**	**130,410**	**134,390**	**137,280**	**140,480**	**144,020**	**152,250**
North County Total	**46.1%**	**45.4%**	**105,800**	**106,550**	**110,410**	**113,230**	**115,400**	**117,820**	**120,490**	**126,720**
Incorporated Total	**76.5%**	**77.5%**	**175,600**	**177,020**	**184,360**	**189,780**	**194,060**	**198,790**	**204,030**	**216,270**
Unincorporated Total	**23.5%**	**22.5%**	**53,830**	**54,250**	**56,470**	**57,840**	**58,640**	**59,510**	**60,480**	**62,700**
South Coast Total	**53.9%**	**54.6%**	**123,630**	**124,720**	**130,410**	**134,390**	**137,280**	**140,480**	**144,020**	**152,250**
City of Carpinteria	3.2%	3.0%	7,350	7,410	7,700	7,880	7,970	8,080	8,200	8,480
City of Santa Barbara	28.1%	29.5%	64,450	65,050	68,120	70,470	72,380	74,480	76,810	82,240
City of Goleta	10.9%	10.5%	25,090	25,290	26,330	26,980	27,370	27,800	28,280	29,390
Unincorporated Total	*11.7%*	*11.5%*	*26,730*	*26,980*	*28,260*	*29,070*	*29,560*	*30,110*	*30,720*	*32,130*
Eastern Goleta Valley	4.3%	4.3%	9,820	9,900	10,310	10,600	10,820	11,060	11,320	11,940
Isla Vista	0.5%	0.5%	1,180	1,190	1,240	1,270	1,300	1,320	1,360	1,430
UCSB	2.7%	2.7%	6,200	6,250	6,510	6,700	6,830	6,980	7,150	7,540
Montecito	1.8%	1.8%	4,020	4,050	4,220	4,340	4,430	4,530	4,640	4,890
Summerland	0.2%	0.2%	530	540	560	580	590	600	620	650
Toro Canyon	0.6%	0.6%	1,440	1,460	1,520	1,560	1,590	1,630	1,670	1,760
Mission Canyon	0.1%	0.1%	240	240	250	260	270	270	280	290
Lompoc Valley Total	**6.9%**	**6.9%**	**15,940**	**16,080**	**16,810**	**17,270**	**17,570**	**17,900**	**18,270**	**19,130**
City of Lompoc	4.6%	4.7%	10,600	10,700	11,190	11,530	11,760	12,030	12,340	13,040
Unincorporated Total	*2.3%*	*2.2%*	*5,340*	*5,380*	*5,620*	*5,750*	*5,810*	*5,870*	*5,940*	*6,090*
Mission Hills	0.1%	0.1%	190	190	200	200	200	210	210	230
Vandenberg	0.3%	0.3%	760	760	800	820	840	860	880	920
Vandenberg SFB	1.3%	1.3%	2,890	2,910	3,030	3,120	3,180	3,250	3,330	3,510
Santa Maria Valley Total	**32.3%**	***31.9%***	**74,160**	**74,640**	**77,120**	**79,040**	**80,630**	**82,380**	**84,330**	**88,890**
City of Santa Maria	25.5%	25.5%	58,540	58,930	60,980	62,590	63,970	65,500	67,200	71,180
City of Guadalupe	0.6%	0.6%	1,340	1,360	1,410	1,440	1,470	1,510	1,540	1,630
Unincorporated Total	*6.2%*	*5.8%*	*14,270*	*14,350*	*14,740*	*15,010*	*15,190*	*15,380*	*15,590*	*16,080*
Orcutt	3.1%	3.1%	7,020	7,070	7,360	7,570	7,730	7,900	8,090	8,530
Santa Ynez Valley Total	**6.7%**	**6.5%**	**15,290**	**15,420**	**16,060**	**16,490**	**16,780**	**17,100**	**17,440**	**18,250**
City of Solvang	1.6%	1.6%	3,740	3,770	3,920	4,020	4,090	4,170	4,260	4,460
City of Buellton	2.0%	2.1%	4,480	4,520	4,720	4,880	5,040	5,210	5,400	5,840
Unincorporated Total	*3.1%*	*2.8%*	*7,080*	*7,130*	*7,430*	*7,590*	*7,650*	*7,710*	*7,790*	*7,950*

Santa Ynez	0.7%	0.7%	1,530	1,540	1,600	1,650	1,680	1,720	1,760	1,860
Los Alamos	0.2%	0.2%	450	450	470	480	490	500	510	540
Los Olivos	0.4%	0.4%	810	810	850	870	890	910	930	980
Ballard	0.1%	0.1%	300	300	310	320	330	340	340	360
Cuyama Valley Total	**0.2%**	**0.2%**	**410**	**410**	**420**	**420**	**430**	**440**	**440**	**450**
New Cuyama	0.0%	0.0%	30	40	40	40	40	40	40	40

Table 10. Sector-Based Subregional Employment Projections, 2024-2060

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

City of Carpinteria	**3.2%**	**3.0%**	**7,350**	**7,410**	**7,700**	**7,970**	**8,200**	**8,480**
Farm	*3.0%*	*2.7%*	*220*	*220*	*220*	*220*	*230*	*230*
Construction	*5.5%*	*5.6%*	*400*	*410*	*430*	*450*	*460*	*470*
Manufacturing	*19.0%*	*18.1%*	*1,400*	*1,410*	*1,450*	*1,490*	*1,520*	*1,540*
Wholesale & Retail Trade	*11.4%*	*9.0%*	*840*	*840*	*840*	*820*	*790*	*760*
Transportation, Utilities	*0.3%*	*0.2%*	*20*	*20*	*20*	*20*	*20*	*20*
Information	*5.2%*	*4.8%*	*380*	*380*	*410*	*410*	*410*	*410*
Financial Activities	*4.3%*	*3.8%*	*320*	*320*	*320*	*320*	*320*	*320*
Professional Services	*14.5%*	*13.9%*	*1,070*	*1,080*	*1,120*	*1,150*	*1,160*	*1,180*
Health & Education	*6.2%*	*11.2%*	*450*	*460*	*500*	*620*	*770*	*950*
Leisure	*12.0%*	*11.9%*	*880*	*890*	*920*	*950*	*980*	*1,010*
Government	*6.9%*	*6.4%*	*510*	*510*	*540*	*550*	*550*	*550*
Not Listed	*1.7%*	*1.5%*	*120*	*120*	*130*	*130*	*130*	*130*
Self-Employment	*10.3%*	*10.8%*	*760*	*760*	*790*	*830*	*870*	*920*
City of Santa Barbara	**28.1%**	**29.5%**	**64,450**	**65,050**	**68,120**	**72,380**	**76,810**	**82,240**
Farm	*0.3%*	*0.2%*	*180*	*180*	*180*	*180*	*180*	*190*
Construction	*5.8%*	*5.3%*	*3,710*	*3,760*	*4,010*	*4,190*	*4,280*	*4,370*
Manufacturing	*2.5%*	*2.2%*	*1,610*	*1,620*	*1,670*	*1,710*	*1,740*	*1,770*
Wholesale & Retail Trade	*9.9%*	*7.0%*	*6,350*	*6,360*	*6,410*	*6,240*	*6,000*	*5,770*
Transportation, Utilities	*1.3%*	*1.1%*	*840*	*850*	*880*	*890*	*880*	*870*
Information	*1.8%*	*1.5%*	*1,150*	*1,160*	*1,230*	*1,250*	*1,240*	*1,230*
Financial Activities	*5.5%*	*4.4%*	*3,530*	*3,530*	*3,520*	*3,540*	*3,580*	*3,620*
Professional Services	*14.9%*	*12.9%*	*9,620*	*9,700*	*10,100*	*10,360*	*10,480*	*10,600*
Health & Education	*18.5%*	*30.5%*	*11,950*	*12,170*	*13,310*	*16,370*	*20,250*	*25,050*
Leisure	*18.1%*	*16.2%*	*11,640*	*11,730*	*12,180*	*12,640*	*12,990*	*13,350*
Government	*11.5%*	*9.7%*	*7,400*	*7,480*	*7,900*	*8,050*	*8,010*	*7,980*
Not Listed	*4.1%*	*3.4%*	*2,660*	*2,670*	*2,730*	*2,770*	*2,790*	*2,810*
Self-Employment	*5.9%*	*5.6%*	*3,810*	*3,840*	*4,000*	*4,200*	*4,390*	*4,630*
City of Goleta	**10.9%**	**10.5%**	**25,090**	**25,290**	**26,330**	**27,370**	**28,280**	**29,390**
Farm	*0.7%*	*0.6%*	*180*	*180*	*180*	*190*	*190*	*190*
Construction	*5.4%*	*5.5%*	*1,360*	*1,380*	*1,480*	*1,540*	*1,570*	*1,600*
Manufacturing	*15.9%*	*14.9%*	*3,980*	*4,010*	*4,140*	*4,250*	*4,320*	*4,390*
Wholesale & Retail Trade	*13.3%*	*10.3%*	*3,350*	*3,350*	*3,380*	*3,280*	*3,160*	*3,040*
Transportation, Utilities	*2.0%*	*1.8%*	*510*	*510*	*530*	*540*	*530*	*530*
Information	*7.8%*	*7.2%*	*1,960*	*1,990*	*2,100*	*2,130*	*2,120*	*2,100*
Financial Activities	*3.1%*	*2.7%*	*780*	*780*	*780*	*780*	*790*	*800*
Professional Services	*17.7%*	*16.6%*	*4,440*	*4,470*	*4,660*	*4,780*	*4,840*	*4,890*
Health & Education	*8.9%*	*15.9%*	*2,230*	*2,270*	*2,490*	*3,060*	*3,780*	*4,680*

Leisure	*10.7%*	*10.4%*	*2,670*	*2,690*	*2,800*	*2,900*	*2,980*	*3,070*
Government	*5.0%*	*4.6%*	*1,260*	*1,280*	*1,350*	*1,370*	*1,370*	*1,360*
Not Listed	*2.9%*	*2.7%*	*740*	*740*	*760*	*770*	*780*	*780*
Self-Employment	*6.4%*	*6.7%*	*1,610*	*1,630*	*1,690*	*1,780*	*1,860*	*1,960*
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*
City of Lompoc	**4.6%**	**4.7%**	**10,600**	**10,700**	**11,190**	**11,760**	**12,340**	**13,040**
Farm	*2.1%*	*1.8%*	*220*	*220*	*220*	*230*	*230*	*230*
Construction	*3.4%*	*3.3%*	*360*	*370*	*390*	*410*	*420*	*430*
Manufacturing	*4.5%*	*4.0%*	*480*	*480*	*500*	*510*	*520*	*520*
Wholesale & Retail Trade	*16.3%*	*12.1%*	*1,730*	*1,740*	*1,750*	*1,700*	*1,640*	*1,570*
Transportation, Utilities	*0.6%*	*0.5%*	*70*	*70*	*70*	*70*	*70*	*70*
Information	*0.2%*	*0.2%*	*20*	*20*	*20*	*20*	*20*	*20*
Financial Activities	*2.0%*	*1.7%*	*210*	*210*	*210*	*210*	*220*	*220*
Professional Services	*5.8%*	*5.2%*	*620*	*620*	*650*	*670*	*670*	*680*
Health & Education	*15.1%*	*25.7%*	*1,600*	*1,630*	*1,790*	*2,200*	*2,720*	*3,360*
Leisure	*11.9%*	*11.1%*	*1,270*	*1,280*	*1,320*	*1,370*	*1,410*	*1,450*
Government	*25.2%*	*22.1%*	*2,670*	*2,700*	*2,850*	*2,900*	*2,890*	*2,880*
Not Listed	*2.4%*	*2.1%*	*260*	*260*	*260*	*270*	*270*	*270*
Self-Employment	*10.3%*	*10.2%*	*1,090*	*1,100*	*1,150*	*1,200*	*1,260*	*1,330*
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*
City of Santa Maria	**25.5%**	**25.5%**	**58,540**	**58,930**	**60,980**	**63,970**	**67,200**	**71,180**
Farm	*31.4%*	*27.2%*	*18,370*	*18,390*	*18,510*	*18,760*	*19,030*	*19,330*
Construction	*3.4%*	*3.3%*	*1,980*	*2,010*	*2,140*	*2,240*	*2,290*	*2,330*
Manufacturing	*4.3%*	*3.9%*	*2,500*	*2,510*	*2,590*	*2,660*	*2,700*	*2,750*
Wholesale & Retail Trade	*12.4%*	*9.3%*	*7,280*	*7,290*	*7,350*	*7,140*	*6,870*	*6,610*
Transportation, Utilities	*2.4%*	*2.1%*	*1,420*	*1,430*	*1,480*	*1,490*	*1,480*	*1,460*
Information	*0.4%*	*0.4%*	*240*	*250*	*260*	*260*	*260*	*260*
Financial Activities	*1.9%*	*1.6%*	*1,120*	*1,120*	*1,120*	*1,120*	*1,140*	*1,150*
Professional Services	*5.6%*	*5.0%*	*3,260*	*3,290*	*3,420*	*3,510*	*3,550*	*3,590*
Health & Education	*15.0%*	*25.8%*	*8,780*	*8,940*	*9,780*	*12,020*	*14,870*	*18,400*
Leisure	*7.2%*	*6.8%*	*4,230*	*4,260*	*4,430*	*4,590*	*4,720*	*4,850*
Government	*9.2%*	*8.2%*	*5,410*	*5,470*	*5,770*	*5,880*	*5,860*	*5,830*
Not Listed	*2.2%*	*1.9%*	*1,310*	*1,320*	*1,350*	*1,360*	*1,380*	*1,380*
Self-Employment	*4.5%*	*4.5%*	*2,650*	*2,670*	*2,780*	*2,920*	*3,060*	*3,220*
City of Guadalupe	**0.6%**	**0.6%**	**1,340**	**1,360**	**1,410**	**1,470**	**1,540**	**1,630**
Farm	*31.2%*	*27.0%*	*420*	*420*	*420*	*430*	*440*	*440*
Construction	*1.5%*	*1.5%*	*20*	*20*	*20*	*20*	*20*	*20*
Manufacturing	*6.7%*	*6.1%*	*90*	*90*	*90*	*100*	*100*	*100*
Wholesale & Retail Trade	*5.9%*	*4.5%*	*80*	*80*	*80*	*80*	*80*	*70*
Transportation, Utilities	*2.1%*	*1.8%*	*30*	*30*	*30*	*30*	*30*	*30*
Financial Activities	*0.7%*	*0.6%*	*10*	*10*	*10*	*10*	*10*	*10*
Professional Services	*1.9%*	*1.8%*	*30*	*30*	*30*	*30*	*30*	*30*
Health & Education	*12.8%*	*22.1%*	*170*	*180*	*190*	*240*	*290*	*360*
Leisure	*1.9%*	*1.8%*	*30*	*30*	*30*	*30*	*30*	*30*
Government	*20.1%*	*17.9%*	*270*	*270*	*290*	*290*	*290*	*290*
Not Listed	*1.3%*	*1.2%*	*20*	*20*	*20*	*20*	*20*	*20*
Self-Employment	*13.8%*	*13.8%*	*180*	*190*	*200*	*200*	*210*	*220*

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*
City of Solvang	**1.6%**	**1.6%**	**3,740**	**3,770**	**3,920**	**4,090**	**4,260**	**4,460**
Farm	*1.9%*	*1.7%*	*70*	*70*	*70*	*70*	*70*	*70*
Construction	*2.9%*	*2.9%*	*110*	*110*	*120*	*120*	*130*	*130*
Manufacturing	*2.8%*	*2.6%*	*100*	*100*	*110*	*110*	*110*	*120*
Wholesale & Retail Trade	*14.1%*	*10.7%*	*530*	*530*	*530*	*520*	*500*	*480*
Transportation, Utilities	*3.5%*	*3.0%*	*130*	*130*	*140*	*140*	*140*	*130*
Information	*0.3%*	*0.2%*	*10*	*10*	*10*	*10*	*10*	*10*
Financial Activities	*3.0%*	*2.6%*	*110*	*110*	*110*	*120*	*120*	*120*
Professional Services	*5.6%*	*5.2%*	*210*	*210*	*220*	*230*	*230*	*230*
Health & Education	*9.3%*	*16.3%*	*350*	*350*	*390*	*480*	*590*	*730*
Leisure	*40.2%*	*38.6%*	*1,500*	*1,510*	*1,570*	*1,630*	*1,680*	*1,720*
Government	*3.6%*	*3.3%*	*140*	*140*	*140*	*150*	*150*	*150*
Not Listed	*1.7%*	*1.5%*	*60*	*60*	*60*	*70*	*70*	*70*
Self-Employment	*11.1%*	*11.3%*	*410*	*420*	*440*	*460*	*480*	*500*
City of Buellton	**2.0%**	**2.1%**	**4,480**	**4,520**	**4,720**	**5,040**	**5,400**	**5,840**
Farm	*15.6%*	*12.6%*	*700*	*700*	*700*	*710*	*720*	*740*
Construction	*5.4%*	*4.9%*	*240*	*240*	*260*	*270*	*280*	*280*
Manufacturing	*9.0%*	*7.6%*	*400*	*410*	*420*	*430*	*440*	*450*
Wholesale & Retail Trade	*10.2%*	*7.1%*	*460*	*460*	*460*	*450*	*430*	*410*
Transportation, Utilities	*0.5%*	*0.4%*	*20*	*20*	*20*	*20*	*20*	*20*
Information	*0.0%*	*0.0%*	*0*	*0*	*0*	*0*	*0*	*0*
Financial Activities	*1.0%*	*0.8%*	*40*	*40*	*40*	*40*	*40*	*40*
Professional Services	*3.4%*	*2.8%*	*150*	*150*	*160*	*160*	*160*	*170*
Health & Education	*21.6%*	*34.7%*	*970*	*980*	*1,080*	*1,320*	*1,640*	*2,030*

Leisure	*18.0%*	*15.9%*	*810*	*810*	*840*	*880*	*900*	*930*
Government	*7.0%*	*5.8%*	*310*	*320*	*330*	*340*	*340*	*340*
Not Listed	*2.4%*	*2.0%*	*110*	*110*	*110*	*110*	*110*	*110*
Self-Employment	*5.9%*	*5.5%*	*260*	*270*	*280*	*290*	*300*	*320*
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*

Suppressed Employment Inputs

The California Employment Development Department (EDD) suppresses QCEW data that threatens worker or employer confidentiality. Data suppression usually occurs due to there being less than 3 employers in any given industry or location (i.e. One farm employer in a city), or few total employees in any given industry or location.

Because of this, place-level sector data was often significantly suppressed, and staff chose to project only total employment for these locations. CDPs without any projections listed (such as Casmalia) available were 100% suppressed.

The number of suppressed employment (employees) for each city and subregion are listed in the tables below.

Table 11. Suppressed Data - Cities

Suppressed Data (Cities)			
Year	**Name**	**Sector**	**Jobs**
2024	Buellton	Suppressed	1,671
2024	Carpinteria	Suppressed	656
2024	Goleta	Suppressed	12
2024	Guadalupe	Suppressed	147
2024	Lompoc	Suppressed	168
2024	Santa Barbara	Suppressed	35
2024	Santa Maria	Suppressed	4

2024	Solvang	Suppressed	141

Table 12. Suppressed Data - Subregions

Suppressed Data (Subregions)			
Year	**Name**	**Sector**	**Jobs**
2024	Cuyama Valley	Suppressed	258
2024	Lompoc Valley	Suppressed	183
2024	Santa Maria Valley	Suppressed	122
2024	Santa Ynez Valley	Suppressed	154
2024	South Coast	Suppressed	67

The impact and likelihood of data suppression is tied to how many jobs a given geography has. From the above geographies, the Cuyama Valley (63% suppressed), the city of Buellton (36% suppressed), the city of Carpinteria (8%), the city of Guadalupe (10%), and the city of Solvang (4%) were the most significantly suppressed. SBCAG worked with local jurisdictions and partners, alongside LEHD data, to fill employment sectors and shares from suppressed data. For places with insignificant levels of suppressed data (<1%) suppressed jobs were bucketed into the "not listed" sector.

Cuyama Valley (Subregion)

- Cuyama Valley was highly suppressed, pointing to concentration among a small number of employers. Using the Cuyama Economic Futures Survey (2024), LEHD, and ACS data, the staff was able to input the suppressed data. The suppressed inputs are as follows: Farm (42% of local jobs, government (13% of local jobs), manufacturing (10% of local jobs), construction (7% of local jobs), financial activities and professional services (8%).

Buellton (City)

- Buellton's suppressed data was filled in using input from local staff and LEHD data. The inputs were Farm (15% of local jobs) and Healthcare and Education (21% of local jobs).

Guadalupe (City)

- Guadalupe's suppressed data was filled in using LEHD data. Suppressed data was added to the manufacturing sector (6% of local jobs) and 50 additional jobs were added to the farm sector (totaling 29% of local jobs).

Carpinteria (City)

- Carpinteria's suppressed data was also filled in using LEHD data. Suppressed data was added to the manufacturing (18% of local jobs) and information (5% of local jobs) sectors. 140 additional jobs were added to the leisure sector (totaling 10% of local jobs) and 116 to the wholesale & retail trade sector (9 of local jobs).

Solvang (City)

- Solvang's suppressed data was also filled in using LEHD data. Suppressed data was added to the transportation and utilities (3%) and information sectors (>10 jobs, less than 1%).

List of Figures

List of Tables

Glossary

AB 1086. A California law that allows a locally developed population forecast to be used for RHNA purposes if the forecast is within 1.5 percent of the California Department of Finance population forecast over the housing forecast period.

ACS (American Community Survey). A U.S. Census Bureau survey that provides demographic, housing, social, and economic data. In this appendix, ACS and Census microdata are used to support household formation and demographic analysis.

Age Cohort. A population group organized by age range, such as 15-19, 20-24, or 65-74. Age cohorts are used in population, fertility, mortality, and household formation calculations.

Age-Specific Fertility Rate (ASFR). The annual number of births to women in a specific age cohort, typically expressed per 1,000 women in that age cohort. ASFR is used to estimate projected births in the cohort-survival component model.

Base Year. The starting year for the forecast. For the 2025 Regional Growth Forecast, the base year is 2025, although some datasets may rely on the most recent available year when 2025 data are not available.

Board of Directors (SBCAG). SBCAG's governing body, made up of elected representatives from Santa Barbara County and its incorporated cities. The Board provides policy direction and takes final action on major SBCAG plans, programs, and funding decisions.

Buildout Capacity. The amount of development that could occur under adopted local plans, zoning, land use designations, development agreements, and known project pipelines. Buildout capacity informed the Local Input Process.

CARB (California Air Resources Board). The state agency responsible for establishing greenhouse gas emissions reduction targets for metropolitan planning organizations under SB 375.

CAGR (Compound Annual Growth Rate). A measure of the average annual growth rate over a specified period, assuming growth compounds evenly over time.

CEQA (California Environmental Quality Act). A state law requires public agencies to evaluate and disclose potential environmental impacts of certain plans, programs, and projects. RGF outputs may support CEQA analysis.

Cohort-Survival Component Model. A population forecasting method that estimates future population by aging existing population cohorts forward and accounting for births, deaths, migration, and group quarters population.

Deaths. The number of people who die during a given period. Deaths are used with births to calculate natural increase.

DOF (California Department of Finance). A state agency that prepares official demographic estimates and projections, including population, household, group quarters, and related demographic data used in the RGF.

Domestic Migration. Movement of people between Santa Barbara County and other locations within the United States.

EDD (California Employment Development Department). A state agency that provides employment data, including Quarterly Census of Employment and Wages data and employment projections used in the RGF.

Employment (EMP). In this appendix, employment refers to jobs by geography and industry sector, including historical employment and projected future employment.

Forecast Horizon. The full period covered by the forecast. The 2025 RGF covers growth between 2025 and 2060, with key milestone years including the RHNA 7th cycle period, CARB target year, and RTP-SCS planning year.

General Plan. A local government's long-range policy document guiding land use, housing, circulation, conservation, safety, and other community development decisions. General Plan capacity was considered during the Local Input Process.

GHG (Greenhouse Gas). Emissions that contribute to climate change. RTP-SCS planning strategies are evaluated in relation to CARB greenhouse gas reduction targets.

Group Quarters (GQ) Population. People living in group living arrangements rather than conventional households, such as college dormitories, military housing, skilled nursing facilities, and correctional institutions.

Headship Rate. Also known as the household formation rate. The probability that a person in a given age group is the head of a household. Headship rates are used to estimate future households from projected household population.

HCD (California Department of Housing and Community Development). The state agency responsible for determining regional housing need and overseeing RHNA requirements.

Household (HH). A housing unit occupied by one or more people. In the RGF, household forecasts are used as a proxy for future housing demand.

Household Formation Rate. The share or probability of persons in a given demographic group who form or head a household. Household formation rates are used to estimate the number of households from the household population.

Household Population. The portion of the population living in households. Household population excludes group quarters residents.

In-Commuter. A worker who lives outside Santa Barbara County but commutes into the county for employment. In-commuting affects the relationship between local population and local employment.

International Migration. Movement of people between Santa Barbara County and locations outside the United States.

IPUMS (Integrated Public Use Microdata Series). A source of anonymized Census and ACS microdata used to analyze householders, age groups, race/ethnicity, and other demographic characteristics.

Jurisdiction A city or county government within the region. Jurisdictions include the incorporated cities of Santa Maria, Santa Barbara, Lompoc, Goleta, Carpinteria, Solvang, Buellton, Guadalupe, and the unincorporated Santa Barbara County.

Land Use Model. A planning tool used to estimate the location, type, and intensity of future development based on population, household, employment, zoning, land use, and local policy assumptions.

LIP (Local Input Process). SBCAG's process for obtaining jurisdictional review and feedback on preliminary population, household, and employment projections. The LIP incorporated local knowledge of planned development, land use changes, constraints, and growth policies.

Migration. The movement of people into or out of a geography. Migration may be domestic or international and is a key component of population change.

Mortality. The occurrence of deaths within a population. Mortality rates are used to estimate survival and future deaths by age cohort.

MPO (Metropolitan Planning Organization). A federally designated regional agency responsible for transportation planning in urbanized areas. As the MPO for Santa Barbara County, SBCAG prepares the RTP-SCS and related regional planning documents.

Natural Increase. The difference between births and deaths during a given period. Positive natural increase occurs when births exceed deaths; negative natural increase occurs when deaths exceed births.

Net Migration. The difference between people moving into a geography and people moving out of it. Net migration may be positive or negative.

North County. Santa Barbara County communities north of the Santa Ynez Mountains.

P/E Ratio. Population-to-Employment Ratio. A reasonableness check comparing population to employment. The ratio helps evaluate whether projected employment growth is generally consistent with projected population growth.

P/H Ratio. Population-to-Household Ratio. A reasonableness check comparing population to households. The ratio helps evaluate whether projected household growth is generally consistent with projected population growth.

Population (POP). The total number of people living in a geography, including both household population and group quarters population.

Projection. An estimate of future population, households, or employment based on data, assumptions, trends, and local inputs. Projections are subject to uncertainty and should be updated periodically.

QCEW (Quarterly Census of Employment and Wages). An employment dataset produced through federal-state cooperation and used to analyze historical employment by industry.

Regional Growth Forecast (RGF). SBCAG's long-range forecast of population, households, and employment for Santa Barbara County and its jurisdictions. The RGF supports long-range transportation planning, RHNA, CEQA analysis, and the RTP-SCS.

RHNA (Regional Housing Needs Assessment). The state-mandated process for determining the number of housing units each region and jurisdiction must plan for across income categories during a housing element cycle.

RTP-SCS (Regional Transportation Plan-Sustainable Communities Strategy). A long-range regional planning document that integrates transportation investments, land use strategies, and greenhouse gas reduction planning.

SB 375. A California law requiring metropolitan planning organizations to prepare a Sustainable Communities Strategy as part of the Regional Transportation Plan to help reduce greenhouse gas emissions from passenger vehicles.

SBCAG. Santa Barbara County Association of Governments. The metropolitan planning organization and regional transportation planning agency for Santa Barbara County.

Shift-Share Model. An employment forecasting and analysis method that separates employment change into broader economic growth, industry-specific trends, and local competitive factors.

South Coast. Southern coastal communities including Santa Barbara, Goleta, Carpinteria, and nearby unincorporated areas.

Technical Planning Advisory Committee (TPAC). A committee of local planning staff and agency representatives that reviews technical planning work, including RGF methodology, assumptions, and results.

Total Fertility Rate (TFR). A summary fertility measure estimating the number of children a woman would have if she experienced current age-specific fertility rates throughout her childbearing years.

Travel Demand Model. A model used to estimate travel behavior, transportation system performance, and future travel patterns based on population, household, employment, land use, and transportation network assumptions.

UCSB (University of California, Santa Barbara). A major institution in Santa Barbara County and a contributor to the group quarters population through student housing.

Unincorporated Area. Land within Santa Barbara County that is outside incorporated city limits and governed by the County.

Vandenberg Space Force Base (VSFB). A major federal military installation in Santa Barbara County and a contributor to the group quarters population.