

MEMORANDUM

TO: San Benito County General Plan Advisory Committee (GPAC) Members

FROM: Dan Amsden, Project Manager, Mintier Harnish
Rik Keller, Senior Associate, Mintier Harnish

DATE: June 9, 2009

SUBJECT: Draft Population, Job, and Housing Unit Forecasts

CC: Art Henriques, Planning and Building Inspection Services Director, San Benito County
Michael Kelly, Associate Planner, San Benito County
Larry Mintier, Principal, Mintier Harnish
Jessica Schwartz, Planner, Mintier Harnish
Bill Lee, Principal, Economics Research Associates
Tanya Chiranakhon, Associate, Economics Research Associates

Dear General Plan Advisory Committee members:

Economics Research Associates, one of the General Plan Update consultants, has prepared a series of population, job, and housing unit forecasts as an initial step in the General Plan Update process. These forecasts are intended to represent alternative futures for the county, based on the best available current data, and will be used to help formulate land use alternatives.

The tables at the end of this memo show the numeric totals for each forecast, broken down by year. The forecasts use the same base year and time frame as the new General Plan – 2010 to 2035. The following is a brief description of the assumptions behind each alternative.

Alternative 1 – AMBAG Forecast

This alternative is the same forecast being used by the Association of Monterey Bay Area Governments (AMBAG) as part of its Monterey Bay Area Blueprint project. Based largely on California Department of Finance data, AMBAG created forecasts at the regional, county, and city level for trends in population, housing units, and jobs between 2010 and 2035. This alternative will be used as a starting point for looking at future change in the county.

As shown in Table 1, under this alternative San Benito County (*including San Juan Bautista, Hollister, and unincorporated San Benito County*) grows to a total population of 94,731 in 2035, with 21,700 jobs and 29,404 housing units. This represents a 1.7 percent growth rate and a total increase from 2010-2035 of 32,300 people.

Alternative 2 – ERA Market Based Forecast

This alternative recognizes regional market forces affecting the county and includes major pending or recently proposed development projects (*e.g., Santana Ranch, Fairview Corners, El Rancho San Benito, and induced surrounding growth*). This alternative is designed to show the higher-end of potential future growth and will be used for comparative purposes during the General Plan Update.

As shown in Table 2, under this alternative San Benito County (*including San Juan Bautista, Hollister, and unincorporated San Benito County*) grows to a total population of 120,762 in 2035, with 30,020 jobs and 39,234 housing units. This represents a 2.7 percent growth rate and a total increase from 2010-2035 of 58,009 people.

Alternative 3 – Hybrid Forecast

This alternative is a hybrid of the first two. It recognizes that the county will grow in response to regional market forces, but the growth will be carefully planned to respect environment and other constraints. This alternative is designed to be more realistic regarding future change than the AMBAG alternative and will be used to draft the preferred land use alternative.

As shown in Table 3, under this alternative San Benito County (*including San Juan Bautista, Hollister, and unincorporated San Benito County*) grows to a total population of 106,154 in 2035, with 25,100 jobs and 33,336 housing units. This represents a 2.1 percent growth rate and a total increase from 2010-2035 of 43,555 people.

Discussion for GPAC

Each forecast raises different questions regarding future demographic and economic shifts in San Benito County. These shifts have implications for future economic growth, transportation mobility, and housing choices. County staff and the General Plan Update consultants will ask the GPAC to provide input on the three forecasts during their June 11, 2009, meeting. The goal of this discussion will be for the GPAC to confirm which of the three forecasts should be used during the General Plan Update.

1 AMBAG FORECAST

PROJECTED POPULATION, EMPLOYMENT AND HOUSING UNITS, 2010-2035

	2010	2015	2020	2025	2030	2035	2010-2035	
							Rate of Growth	Absolute Growth
Population								
Hollister	40,415	44,613	49,064	54,143	59,259	62,756	1.8%	22,341
San Juan Bautista	1,937	2,121	2,356	2,570	2,743	2,907	1.6%	970
Unincorporated	20,079	21,737	24,720	26,671	27,429	29,068	1.5%	8,989
Total San Benito County	62,431	68,471	76,140	83,383	89,431	94,731	1.7%	32,300
Monterey County	445,309	466,606	483,733	499,341	515,549	530,362	0.7%	85,053
Santa Cruz County	268,041	273,983	280,493	285,735	290,597	295,621	0.4%	27,580
Santa Clara County	1,867,500	1,971,100	2,085,300	2,177,800	2,279,100	2,380,400	1.0%	512,900
Total Four County Region	2,643,281	2,780,160	2,925,666	3,046,259	3,174,677	3,301,114	0.9%	657,833
San Benito County Share of Region	2.4%	2.5%	2.6%	2.7%	2.8%	2.9%		
Employment								
Hollister	10,898	11,393	12,056	12,698	13,398	13,893	1.0%	2,995
San Juan Bautista	220	233	248	265	283	299	1.2%	79
Unincorporated	6,262	6,465	6,745	7,007	7,299	7,508	0.7%	1,246
Total San Benito County	17,380	18,090	19,050	19,970	20,980	21,700	0.9%	4,320
Retail	2,910	3,030	3,220	3,360	3,530	3,800	1.1%	890
Service	4,690	5,010	5,350	5,750	6,190	6,500	1.3%	1,810
Industrial	2,870	2,900	3,000	3,070	3,180	3,040	0.2%	170
Public ¹	2,570	2,700	2,840	3,000	3,150	3,290	1.0%	720
Construction	2,400	2,500	2,680	2,820	2,940	3,070	1.0%	670
Agriculture	1,940	1,950	1,960	1,970	1,990	2,000	0.1%	60
Monterey County	196,430	203,660	211,160	218,830	226,780	235,460	0.7%	39,030
Santa Cruz County	115,070	120,800	126,870	133,350	140,160	147,460	1.0%	32,390
Santa Clara County	938,330	1,017,060	1,098,290	1,183,840	1,272,950	1,365,810	1.5%	427,480
Total Four County Region	1,267,210	1,359,610	1,455,370	1,555,990	1,660,870	1,770,430	1.3%	503,220
San Benito County Share of Region	1.4%	1.3%	1.3%	1.3%	1.3%	1.2%		
Housing Units								
Hollister	11,544	12,816	14,085	15,605	17,108	18,221	1.8%	6,677
San Juan Bautista	764	837	927	1,015	1,084	1,148	1.6%	384
Unincorporated	6,879	7,457	8,471	9,181	9,482	10,035	1.5%	3,156
Total San Benito County	19,187	21,110	23,483	25,800	27,674	29,404	1.7%	10,217
Monterey County	147,221	156,061	162,857	169,933	176,236	182,082	0.9%	34,861
Santa Cruz County	105,509	107,496	110,143	112,040	113,865	115,590	0.4%	10,081
Santa Clara County ²	628,870	665,000	701,470	732,830	769,750	806,210	1.0%	177,340
Total Four County Region	900,787	949,667	997,953	1,040,603	1,087,525	1,133,286	0.9%	232,499
San Benito County Share of Region	2.1%	2.2%	2.4%	2.5%	2.5%	2.6%		

¹ Includes employment in Education, Government and Other

² Households

Sources: AMBAG 2008 Forecast, ABAG Projections 2007

2 ERA MARKET-BASED FORECAST

PROJECTED POPULATION, EMPLOYMENT AND HOUSING UNITS, 2010-2035

	2010	2015	2020	2025	2030	2035	2010-2035	
							Rate of Growth	Absolute Growth
Population								
Hollister	40,415	44,613	49,064	54,143	59,259	62,756	1.8%	22,341
San Juan Bautista	1,937	2,121	2,356	2,570	2,743	2,907	1.6%	970
Unincorporated	20,400	24,548	32,673	40,650	47,434	55,099	4.1%	34,698
Total San Benito County	62,752	71,282	84,093	97,363	109,436	120,762	2.7%	58,009
Monterey County	445,309	466,606	483,733	499,341	515,549	530,362	0.7%	85,053
Santa Cruz County	268,041	273,983	280,493	285,735	290,597	295,621	0.4%	27,580
Santa Clara County	1,867,500	1,971,100	2,085,300	2,177,800	2,279,100	2,380,400	1.0%	512,900
Total Four County Region	2,643,602	2,782,971	2,933,619	3,060,239	3,194,682	3,327,145	0.9%	683,542
San Benito County Share of Region	2.4%	2.6%	2.9%	3.2%	3.4%	3.6%		
Employment								
Hollister	10,898	11,393	12,056	12,698	13,398	13,893	1.0%	2,995
San Juan Bautista	220	233	248	265	283	299	1.2%	79
Unincorporated	6,363	7,355	9,278	11,469	13,690	15,828	3.7%	9,465
Total San Benito County	17,481	18,980	21,583	24,432	27,371	30,020	2.2%	12,539
Retail	2,934	3,233	3,782	4,342	4,931	5,620	2.6%	2,686
Service	4,709	5,167	5,770	6,474	7,219	7,833	2.1%	3,124
Industrial	2,908	3,172	3,631	4,102	4,613	4,873	2.1%	1,965
Public ¹	2,589	2,915	3,552	4,308	5,054	5,790	3.3%	3,201
Construction	2,400	2,542	2,888	3,237	3,565	3,903	2.0%	1,503
Agriculture	1,940	1,950	1,960	1,970	1,990	2,000	0.1%	60
Monterey County	196,430	203,660	211,160	218,830	226,780	235,460	0.7%	39,030
Santa Cruz County	115,070	120,800	126,870	133,350	140,160	147,460	1.0%	32,390
Santa Clara County	938,330	1,017,060	1,098,290	1,183,840	1,272,950	1,365,810	1.5%	427,480
Total Four County Region	1,267,311	1,360,500	1,457,903	1,560,452	1,667,261	1,778,750	1.4%	511,439
San Benito County Share of Region	1.4%	1.4%	1.5%	1.6%	1.6%	1.7%		
Housing Units								
Hollister	11,544	12,816	14,085	15,605	17,108	18,221	1.8%	6,677
San Juan Bautista	764	837	927	1,015	1,084	1,148	1.6%	384
Unincorporated	6,996	8,496	11,453	14,446	17,029	19,865	4.3%	12,870
Total San Benito County	19,304	22,149	26,465	31,066	35,221	39,234	2.9%	19,931
Monterey County	147,221	156,061	162,857	169,933	176,236	182,082	0.9%	34,861
Santa Cruz County	105,509	107,496	110,143	112,040	113,865	115,590	0.4%	10,081
Santa Clara County ²	628,870	665,000	701,470	732,830	769,750	806,210	1.0%	177,340
Total Four County Region	900,904	950,706	1,000,935	1,045,869	1,095,072	1,143,116	1.0%	242,213
San Benito County Share of Region	2.1%	2.3%	2.6%	3.0%	3.2%	3.4%		

¹ Includes employment in Education, Government and Other

² Households

Sources: AMBAG 2008 Forecast, ABAG Projections 2007, Economics Research Associates 2009

3 HYBRID POLICY/MARKET-BASED FORECAST

PROJECTED POPULATION, EMPLOYMENT AND HOUSING UNITS, 2010-2035

	2010	2015	2020	2025	2030	2035	2010-2035	
							Rate of Growth	Absolute Growth
Population								
Hollister	40,415	44,613	49,064	54,143	59,259	62,756	1.8%	22,341
San Juan Bautista	1,937	2,121	2,356	2,570	2,743	2,907	1.6%	970
Unincorporated	20,246	23,095	28,329	32,884	36,247	40,491	2.8%	20,244
Total San Benito County	62,598	69,829	79,749	89,597	98,249	106,154	2.1%	43,555
Monterey County	445,309	466,606	483,733	499,341	515,549	530,362	0.7%	85,053
Santa Cruz County	268,041	273,983	280,493	285,735	290,597	295,621	0.4%	27,580
Santa Clara County	1,867,500	1,971,100	2,085,300	2,177,800	2,279,100	2,380,400	1.0%	512,900
Total Four County Region	2,643,448	2,781,518	2,929,275	3,052,473	3,183,495	3,312,537	0.9%	669,088
San Benito County Share of Region	2.4%	2.5%	2.7%	2.9%	3.1%	3.2%		
Employment								
Hollister	10,898	11,393	12,056	12,698	13,398	13,893	1.0%	2,995
San Juan Bautista	220	233	248	265	283	299	1.2%	79
Unincorporated	6,305	6,837	7,789	8,836	9,914	10,908	2.2%	4,603
Total San Benito County	17,423	18,462	20,094	21,799	23,595	25,100	1.5%	7,677
Retail	2,922	3,128	3,475	3,797	4,148	4,600	1.8%	1,678
Service	4,698	5,073	5,518	6,040	6,602	7,033	1.6%	2,336
Industrial	2,885	3,009	3,253	3,483	3,753	3,773	1.1%	888
Public ¹	2,578	2,786	3,125	3,523	3,912	4,290	2.1%	1,712
Construction	2,400	2,517	2,763	2,987	3,190	3,403	1.4%	1,003
Agriculture	1,940	1,950	1,960	1,970	1,990	2,000	0.1%	60
Monterey County	196,430	203,660	211,160	218,830	226,780	235,460	0.7%	39,030
Santa Cruz County	115,070	120,800	126,870	133,350	140,160	147,460	1.0%	32,390
Santa Clara County	938,330	1,017,060	1,098,290	1,183,840	1,272,950	1,365,810	1.5%	427,480
Total Four County Region	1,267,253	1,359,982	1,456,414	1,557,819	1,663,485	1,773,830	1.4%	506,577
San Benito County Share of Region	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%		
Housing Units								
Hollister	11,544	12,816	14,085	15,605	17,108	18,221	1.8%	6,677
San Juan Bautista	764	837	927	1,015	1,084	1,148	1.6%	384
Unincorporated	6,926	7,873	9,664	11,287	12,501	13,967	2.8%	7,041
Total San Benito County	19,234	21,526	24,676	27,907	30,693	33,336	2.2%	14,102
Monterey County	147,221	156,061	162,857	169,933	176,236	182,082	0.9%	34,861
Santa Cruz County	105,509	107,496	110,143	112,040	113,865	115,590	0.4%	10,081
Santa Clara County ²	628,870	665,000	701,470	732,830	769,750	806,210	1.0%	177,340
Total Four County Region	900,834	950,083	999,146	1,042,710	1,090,544	1,137,218	0.9%	236,384
San Benito County Share of Region	2.1%	2.3%	2.5%	2.7%	2.8%	2.9%		

¹ Includes employment in Education, Government and Other

² Households

Sources: AMBAG 2008 Forecast, ABAG Projections 2007, Economics Research Associates 2009