

Executive Summary

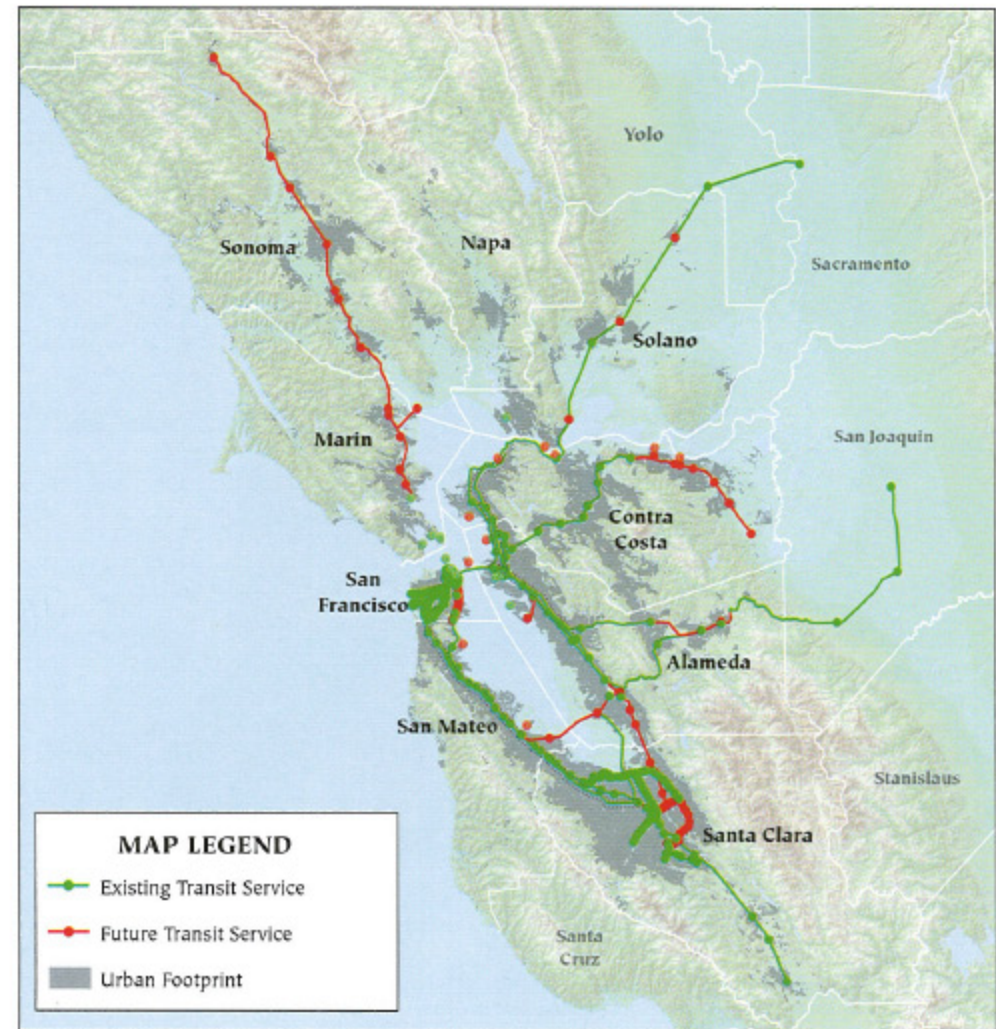
The Association of Bay Area Governments (ABAG), as the Bay Area's land use planning agency, is responsible for making long-term forecasts of population, households, and employment, as well as working with local jurisdictions on land use planning issues. *Projections 2007* is the most recent edition of our long-term forecast. Issued every two years, *Projections* has included "policy assumptions" since 2003.

The forecast is designed to be a realistic assessment of growth in the region, but recognizes emerging trends in markets, demographics, and local policies that promote more compact infill development and transit-oriented development. This is particularly the case around fixed transit stations (rail and ferry terminals) and in selected transportation corridors. While these areas will see an increasing proportion of the region's growth, we expect that increase will begin slowly and expand over time.

We expect that between 2005 and 2035 the Bay Area's population will grow by about 2 million people. While we will also see about 1.75 million jobs added during the same time period, it is the growth in population and how it will shape the region in 2035 that is central to the forecast.

We expect the population to change in significant ways by 2035. For example, the median age in the Bay Area will increase from 36.5 years in 2005 to 42.5 years old by the end of the forecast in year 2035. This reflects a significant increase in the older population, with the 60-70

Existing and Future Transit Service Heavy Rail, Light Rail, and Ferry Terminals



Source: Metropolitan Transportation Commission 2005 Existing and Future Transit Database

year old, 70-80 year old, and the over 80 year old cohorts increasing dramatically from today's numbers.

Existing Land Use In 2005



Source: Association of Bay Area Governments 2005 Existing Land Use Study

The older population will be different at the end of the forecast than the older population today. More of the older population will be active in the workforce in 2035. More are also likely to be living in urban areas so that they can have access to services and public transportation.

Recent trends, both in the Bay Area and nationwide, show an increase in the proportion of one and two person households. These are households that represent an older population whose grown children no longer live at home, and young professionals who are increasing delaying children or choosing not to have children. While households will continue to run the gamut of sizes and configurations, the trends suggest an increasing market for smaller housing units in urban areas.

Of course, the other issue is the price of housing. Bay Area housing is among the most expensive in the United States. Increasing the amount of smaller, more compact housing is one important way to address the cost of living in the region.

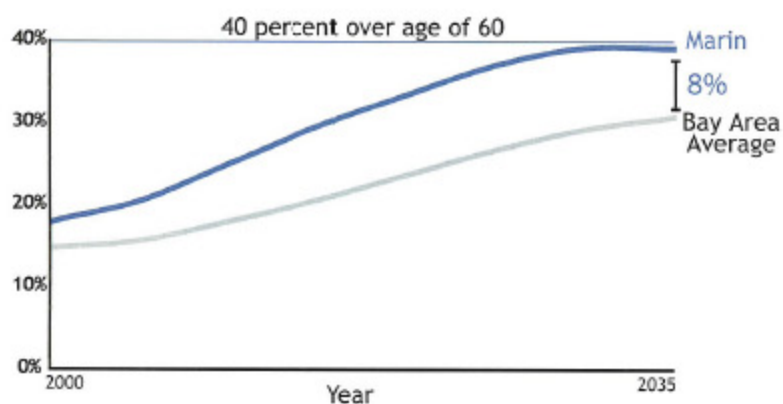
ABAG's *Projections 2007* forecast shows that growth will occur across the region, but the pace of growth and the character of local areas will differ. Even with 2 million more residents, we continue to believe that the Bay Area will be a mix that includes large amounts of open space, rural areas, suburban areas, and urban areas.

Marin County Projections

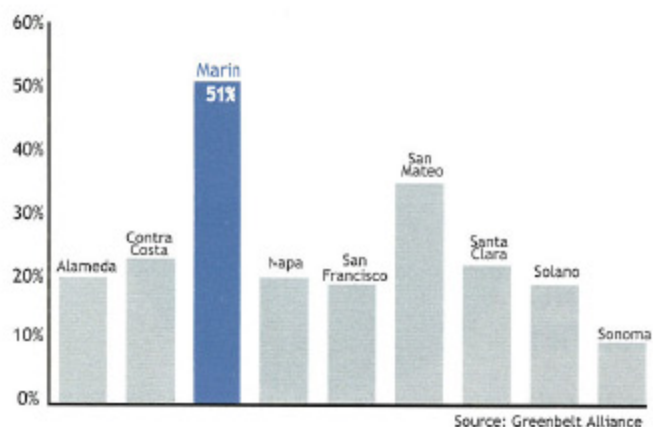
	2000	2005	2010	2015	2020	2025	2030	2035
Population	247,289	252,600	258,400	264,700	270,600	275,000	279,100	283,100
Household Population	235,803	241,300	246,900	252,900	258,700	263,000	267,100	271,100
Households	100,650	103,180	105,340	107,930	110,490	112,810	114,970	116,800
Persons Per Household	2.34	2.34	2.34	2.34	2.34	2.33	2.32	2.32
Employed Residents	131,959	122,200	127,800	131,900	138,900	143,600	146,600	152,500
Mean Household Income	\$126,500	\$121,600	\$127,700	\$134,600	\$142,100	\$149,900	\$158,200	\$166,800
	2000	2005	2010	2015	2020	2025	2030	2035
Ag & Natural Resources	810	810	810	810	810	810	810	810
Construction	10,480	10,610	11,440	12,020	12,350	12,650	12,920	13,170
Manufacturing & Wholesale	9,950	9,620	9,690	9,730	9,810	9,910	10,190	10,350
Retail	16,640	16,920	17,510	18,050	18,590	19,170	19,800	20,430
Transportation & Utilities	3,860	4,160	4,250	4,410	4,580	4,770	4,830	4,910
Information	6,940	6,810	6,660	6,680	6,720	6,800	6,910	7,050
Financial & Leasing	13,270	13,380	14,180	14,880	15,780	16,710	17,280	17,930
Prof & Managerial Services	23,580	23,830	24,880	25,730	26,440	27,220	28,410	29,470
Health & Educ Services	23,800	23,860	24,960	25,910	26,520	27,430	28,170	29,230
Arts, Rec & Other Services	19,470	19,870	20,770	21,520	22,580	23,540	24,780	25,700
Government	5,380	5,500	5,640	5,570	5,680	5,830	6,010	6,130
Total Jobs	134,180	135,370	140,790	145,310	149,860	154,840	160,110	165,180

Source: 2000 demographic data are taken directly from the U.S. Census. 2000 employment data are derived from the Census Transportation Planning Package. 2000 income data are from U.S. Census, based on 1999 income and then adjusted to 2005 dollars. ABAG updated these data to 2005 based on the Bay Area CPI and real income growth estimates for each county from the Bureau of Economic Analysis. All income data are expressed in constant 2005 dollars.

POPULATION OVER AGE 60 2000 TO 2035



PROTECTED OPEN SPACE 2000



The Forecast in Marin County

Infill development in the cities of Novato and San Rafael will slightly increase the populations of existing residential communities in these cities. The Northwestern Pacific rail line will offer improved transportation access to the towns of Novato and San Rafael, as well as promote new residential and mixed-use developments adjacent to the new rail stations.

While the forecast shows economic growth in Marin County, that growth will occur at a slower rate than other counties in the northern part of the region. We expect the county to grow by almost 30,000 jobs between 2005 and 2035. The assumption that more of the region's growth will be located near transit and in existing communities causes more of the growth to occur in the region's southern counties.

San Rafael will continue to revitalize its downtown with intensified, mixed-use development and a large urban office campus. More mixed use development will occur in the downtown areas of Fairfax, Larkspur, and the unincorporated area known as Marin City. This pattern of development will allow for slight increases in the communities' housing and employment.

Subregional Study Areas

Marin County Subregional Study Areas are defined by using LAFCO Spheres of Influence (SOI) boundaries. Corte Madera, Fairfax, Larkspur, Mill Valley, Novato, Ross, San Anselmo, San Rafael, Sausalito, and Tiburon all have unincorporated areas within each city's SOI, while Belvedere includes only land within its current city limits. LAFCO is undertaking a review of all the cities' spheres. So far they have considered and approved changes to the spheres for Novato, Mill Valley, San Rafael, Sausalito, and Tiburon. This document reflects those changes. Further changes are anticipated but are not yet adopted for Corte Madera, Fairfax, Larkspur, and San Anselmo. These are not included in *Projections 2007*.

Larkspur's SOI includes unincorporated Kentfield and Greenbrae. Novato's SOI includes Loma Verde and the Vineyard Road and Atherton Avenue areas. San Rafael's SOI comprises several unincorporated territories surrounded or nearly surrounded by the City's boundary, but excludes the St. Vincent's/Silveira, Lucas Valley and Marinwood areas. San Anselmo's SOI encompasses unincorporated Sleepy Hollow. Tiburon's SOI no longer includes the Strawberry Point area. It does include the Paradise Drive area and Eagle Rock/West Tiburon areas. Mill Valley includes unincorporated Alto, Almonte, and Homestead Valley areas. The Sausalito SOI used to include unincorporated Marin City, but it no longer does. The Remainder area is comprised of all unincorporated

FORECAST BY SUBAREA CHANGES 2005-2035

URBAN NORTH		
Novato		
9,300	3,860	10,230
POPULATION	HOUSEHOLDS	JOBS
URBAN SOUTH		
Belvedere, Corte Madera, Fairfax, Larkspur-Kentfield, Mill Valley, Ross, San Anselmo, San Rafael, Sausalito, Tiburon		
19,200	8,830	17,270
POPULATION	HOUSEHOLDS	JOBS
RURAL		
Remainder		
2,000	930	2,310
POPULATION	HOUSEHOLDS	JOBS
COUNTY TOTAL		
30,500	13,620	29,810
POPULATION	HOUSEHOLDS	JOBS

areas outside the cities' SOI and urban service areas. In particular, the Remainder includes Pt. Reyes, Inverness, Bolinas, Stinson Beach, Forest Knolls, Woodacre, Marin City, Tamalpais Valley, St. Vincent's/Silveira, Indian Valley, Bel Marin Keys, Blackpoint/Greenpoint, Gness Field, and Strawberry Point.