ABOUT CALIFORNIA 100

The California 100 Initiative envisions a future that is innovative, sustainable, and equitable for all. Our mission is to strengthen California’s ability to collectively solve problems and shape our long-term future over the next 100 years.

California 100 is organized around 5 policy themes and 5 core values, and driven by interrelated stages of work: research, policy innovation, and engagement with Californians. California 100’s work is guided by an expert and intergenerational Commission.

Through various projects and activities, California 100 seeks to move California towards an aspirational vision—changing policies and practices, attitudes and mindsets, to inspire a more vibrant future. This Regional Analysis was produced as part of California 100’s research stream of work.

The California 100 initiative is incubated through the University of California and Stanford.

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In a state with the hottest, driest, and lowest point place in North America—Death Valley in the Mojave Desert, the highest mountain in the continental United States—Mt. Whitney in the Sierra Nevada Mountains, and an 840-mile coastline along the Pacific Ocean with a Mediterranean climate, California encompasses distinctive regions with markedly different characteristics, histories, and challenges. These regions range from the highly urban South Coast and Bay Area on the western edge of the state bordering the Pacific Ocean to the highly rural, sparsely-populated, and mountainous Far North and Sierra in the eastern and northern parts of the state. In between, in terms of population density and to a large extent geographically, are the growing and increasingly urban, but still partly agricultural, areas such as the Sacramento Metro, the Inland Empire, and the Southern Border as well as the intensely productive agricultural areas with major cities such as the extraordinarily fertile San Joaquin Valley and the wine regions and Salinas Valley of the Central Coast. Because these regions are so different, we have produced separate reports on each one with a focus on the factors—the “regional drivers”—that affect each one.
## Regional Breakdown by County

<table>
<thead>
<tr>
<th>Region</th>
<th>Counties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bay Area</td>
<td>Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, Sonoma</td>
</tr>
<tr>
<td>Central Coast</td>
<td>Monterey, San Benito, San Luis Obispo, Santa Barbara, Santa Cruz, Ventura</td>
</tr>
<tr>
<td>Far North</td>
<td>Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Nevada, Plumas, Shasta, Sierra, Siskiyou, Tehama, Trinity</td>
</tr>
<tr>
<td>Inland Empire</td>
<td>Riverside, San Bernardino</td>
</tr>
<tr>
<td>Sacramento Metro</td>
<td>El Dorado, Placer, Sacramento, Sutter, Yolo, Yuba</td>
</tr>
<tr>
<td>San Joaquin Valley</td>
<td>Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus, Tulare</td>
</tr>
<tr>
<td>Sierra</td>
<td>Alpine, Amador, Calaveras, Inyo, Mariposa, Mono, Tuolumne</td>
</tr>
<tr>
<td>South Coast</td>
<td>Los Angeles, Orange</td>
</tr>
<tr>
<td>Southern Border</td>
<td>Imperial, San Diego</td>
</tr>
</tbody>
</table>
## Table 2: Population, Land Mass, and Per Capita Density by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Population</th>
<th>The Region’s Population as a Total of the Whole State</th>
<th>Land Area (sq. mi.)</th>
<th>The Region’s Land Area as a Total of the Whole State</th>
<th>Density of region (People per square mile)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bay Area</td>
<td>7,765,640</td>
<td>19.6%</td>
<td>6,906</td>
<td>4.4%</td>
<td>1,124.5</td>
</tr>
<tr>
<td>Central Coast</td>
<td>2,348,601</td>
<td>6.0%</td>
<td>13,092</td>
<td>8.4%</td>
<td>179.4</td>
</tr>
<tr>
<td>Far North</td>
<td>1,061,227</td>
<td>2.7%</td>
<td>42,542</td>
<td>27.3%</td>
<td>25.0</td>
</tr>
<tr>
<td>Inland Empire</td>
<td>4,599,839</td>
<td>11.6%</td>
<td>27,263</td>
<td>17.5%</td>
<td>168.7</td>
</tr>
<tr>
<td>Sacramento Metro</td>
<td>2,578,590</td>
<td>6.5%</td>
<td>6,329</td>
<td>4.1%</td>
<td>407.4</td>
</tr>
<tr>
<td>San Joaquin Valley</td>
<td>4,313,060</td>
<td>10.9%</td>
<td>27,261</td>
<td>17.5%</td>
<td>158.2</td>
</tr>
<tr>
<td>Sierra</td>
<td>191,932</td>
<td>0.5%</td>
<td>19,253</td>
<td>12.4%</td>
<td>10.0</td>
</tr>
<tr>
<td>South Coast</td>
<td>13,200,998</td>
<td>33.4%</td>
<td>4,849</td>
<td>3.1%</td>
<td>2,722.4</td>
</tr>
<tr>
<td>Southern Border</td>
<td>3,478,336</td>
<td>8.8%</td>
<td>8,384</td>
<td>5.4%</td>
<td>414.9</td>
</tr>
<tr>
<td>TOTAL</td>
<td>39,029,342</td>
<td>100%</td>
<td>163,696</td>
<td>100%</td>
<td>**</td>
</tr>
</tbody>
</table>

**Source:** 2020 Decennial Census and County Square Mileage.  
**Note:** Higher numbers in the last column indicate higher population density and lower ones indicate lower population density.
Each report focuses on regional drivers introduced below. The regions differ in their (1) technological innovation and educational institutions, their (2) economies and industries, their (3) climates and environments, and their (4) social and political issues.

The Bay Area leads the way for **technology and innovation** with the University of California and Stanford University, Lawrence Berkeley and Livermore National Laboratories, and Silicon Valley. The South Coast is also an innovative hub for trade, entertainment, and advanced technology with three great universities, UCLA, CalTech and USC, and two great ports, Los Angeles and Long Beach. The Southern Border has innovative universities, such as UC San Diego, and a strong transnational and global identity linked to trade and manufacturing due to its proximity to Tijuana and Mexico. Other regions in the state have strong educational institutions that already produce innovation or could catalyze more of it in their regions. For example, moving from south to north, the Inland Empire with UC Riverside, the San Joaquin Valley with UC Merced and Cal State Fresno, the Central Coast with UC Santa Barbara and Cal Poly San Luis Obispo, the Sacramento Metro with UC Davis, and the North Coast of the Far North region with the newly christened Cal Poly Humboldt. Some regions face difficult problems of developing innovative businesses and retaining or recruiting a highly-skilled workforce (Far North and Inland Empire).
All regions must deal with economic challenges. The Bay Area faces growing income inequality and rising costs of living; the Central Coast maintains a heavy dependence on low-wage labor while the Inland Empire relies on the low-wage logistics and warehousing industry; the San Joaquin Valley must reckon with the uncertain future of its dominant agricultural industry due to water scarcity and temperature change while the Far North faces similar issues due to climate change; the Sacramento Metro must extend its industries beyond government employment; and the Southern Border similarly must grow and diversify its industries beyond its historic focus rooted in the military with an eye to the advantages provided by its proximity to Mexico. The Sierra region relies heavily upon tourism and part time residents that both support the region and create housing challenges.

Water shortages are a threat throughout the state, but especially in the South Coast and Southern Border that depend upon water from the north and from the Colorado River. Similarly, the San Joaquin Valley depends upon irrigation and groundwater, which is being quickly depleted due to overuse.

Other social and political issues also challenge the regions. Housing problems affect all the major urban areas—the Bay Area and South Coast—and some of the more rural ones, including the eastern parts of the Sacramento Metro and the Sierra region. These problems include affordability and access to housing, which exacerbates issues of homelessness and often disproportionately affects people of color. Poverty, inequality, and segregation are especially problematic in agricultural and rural areas, particularly in the San Joaquin Valley, Central Coast, and Far North. Also vexing are political issues such as low levels of political participation in the Inland Empire, fragmented governance in the Bay Area, and political discontent in the Far North stemming from perceived neglect on the part of the rest of the state.

The following pages provide a one-page summary of each regional report that elaborates on these regional drivers.
BAY AREA

Land mass: 6,900 square miles (4% of the state’s total land area)
Population: 7.7 million people (20% of the state’s total population)
Bay Area Regional Drivers Summary:

The Bay Area Leads the Way for Technology and Innovation: Silicon Valley houses some of the world’s most innovative and forward-thinking companies. These companies are at the forefront of developing new technologies and products, and their innovations often serve as the foundation for future advancements in areas such as artificial intelligence, autonomous vehicles, and renewable energy. This innovation has led to the growth of other technology-based companies and startups in the region, further driving economic growth and development.

Income Inequality Amidst Rising Cost of Living: The Bay Area has the highest level of personal income of any metro in the country, but it also has the greatest income inequality. The high cost of living contributes to social and economic inequality, as low-income residents are disproportionately affected by the high cost of housing, healthcare, education, and other necessities. This disparity can lead to a lack of access to basic services and opportunities for many residents in the surrounding counties, exacerbating poverty and other social issues.

Fragmented Governance Reduces the Ability to Achieve the Region’s Goals: The Bay Area is made up of nine counties, each with its own government, responsible for providing services such as law enforcement, education, and infrastructure within its borders. These disparate governmental entities mean that decision-making and the provision of services are often divided among different levels of government and many public agencies, resulting in a lack of coordination and inefficiency.
CENTRAL COAST

Land mass: 15,000 square miles (9% of the state’s total land area)
Population: 2.3 million people (6% of the state’s total population)
CENTRAL COAST REGIONAL DRIVERS SUMMARY:

**Risks of Rising Sea Levels, Wildfires, and Mudslides:** As a region that lies along the Pacific Ocean, the Central Coast is particularly vulnerable to the effects of climate change; namely, rising sea levels risk both the coastal infrastructure and the potential contamination of the region’s groundwater, while increasingly severe wildfires damage communities and release harmful airborne pollutants.

**Heavy Dependence on Low-Wage Work:** As an economy largely dependent on tourism and agriculture, the Central Coast has a greater proportion of low-pay, low-skill work relative to the rest of the state. This has led to wage imbalance affecting workers’ job security and ability to find affordable housing, an issue that was magnified during the pandemic, when nearly 70 percent of workers in the tourism and hospitality industry lost their jobs.

**Access to Strong Education Network:** In contrast to the prevalence of low-wage work in the region, the Central Coast is also home to a number of higher-education institutions, which have partnered with industries from AgTech to aerospace to create more jobs in the region. However, access to these networks varies throughout the region, with counties like Monterey and San Benito – home to many foreign-born, agricultural workers – falling behind wealthier regions, including Santa Barbara and San Luis Obispo counties, both of which have major universities.
FAR NORTH

Land mass: 43,000 square miles (25% of the state's total land area)
Population: 1 million people (<1% of the state's total population)
FAR NORTH REGIONAL DRIVERS SUMMARY:

The Far North Experiences the Brunt of All Forms of Climate Change: Relative to the rest of California, the Far North region is disproportionately affected and particularly vulnerable to lightning-caused wildfires. In the Far North region, where elevations average among the highest in the state, the risk of dry thunderstorms increases. As the vegetation in these regions dries during hot summer months, the amount of fuel for fires grows: not only are fires more likely, but the severity of fires also increases. The Far North has experienced both the largest and many of the most deadly wildfires in the entire state. The effects of these fires have been devastating on both the local communities, and the state more broadly. During the 2020 fire season in California, enough carbon dioxide emissions were released to undo the effects of 18 years of statewide emission-cutting efforts. Furthermore, climate change in the Far North has gradually affected the area’s physical systems, spurring the loss of glaciers and declines in wildlife populations.

Limited Economic Opportunities: The Far North is a rural region with limited economic opportunities. The region is largely rural and sparsely populated, which can limit the demand for certain types of businesses and industries. Additionally, the Far North has been historically reliant on industries like logging and mining, and it has seen particular declines in these industries in recent decades due to changing economic conditions and environmental concerns. In response, many parts of the Far North have attempted to shift their economies toward renewable energy production. However, even when jobs are available, wages in the Far North tend to be lower than in other parts of the state. The region also faces challenges in attracting and retaining skilled workers, as many young people leave the area to pursue educational and career opportunities elsewhere.

Limited Access to Amenities and Services: The Far North is a remote and sparsely populated region, which makes it challenging for people to access services and amenities such as education, healthcare, housing, and entertainment. This lack of infrastructure can deter skilled workers from moving to the region. The Far North region has limited cultural amenities, such as museums, theaters, and other cultural institutions. This can make it less attractive to skilled workers who are looking for a vibrant and diverse cultural scene.
INLAND EMPIRE

**Land mass:** 27,000 square miles (17% of the state’s total land area)

**Population:** 4.6 million people (12% of the state’s total population)
INLAND EMPIRE REGIONAL DRIVERS SUMMARY:

**Compounding Effects of Industry and Commuting:** Given its proximity to the ports of Los Angeles and Long Beach, and availability of agricultural land, the Inland Empire has emerged as a hub for warehousing and logistics for transportation of goods throughout the country. The dominance of the industry has affected both the environment and the region’s residents: roughly 40% of the nation’s goods travel through the Inland Empire, often carried by diesel trucks, thus adding to the traffic and congestion along freeways in the region. Consequently, San Bernardino and Riverside Counties have received failing grades for their levels of air pollution (including particulate matter and ozone), which can have long-term, and even deadly, consequences for residents.

**Combatting Automation with the Rise of the Logistics Industry:** The logistics industry in the Inland Empire provides jobs, but its poor working conditions and low wages have led to high turnover rates. Impending automation threatens to further reduce job opportunities in the future. Efforts to improve educational attainment are underway to combat future job loss, but it is not clear what jobs will be available.

**Understanding Poor Civic Engagement and Low Voter Turnout:** Although the trend is improving, for many years, voter participation in the Inland Empire – in both midterm and presidential elections – fell below statewide participation. As of 2017, only 26 percent of Latino residents in the Inland Empire voted, despite comprising more than 50 percent of the region’s electorate. Consequently, the local governments – which often make decisions about land use, including the expansion of warehousing near schools and homes – are not necessarily representative of their constituents.
SACRAMENTO METRO

Land mass: 6,000 square miles (5% of the state’s total land area)
Population: 2.5 million people (6% of the state’s total population)
SACRAMENTO METRO REGIONAL DRIVERS SUMMARY:

**Hopes to Diversify Its Economy Beyond Government:** The Sacramento Metro region relies heavily on government for employment and its economy. In fact, as of August 2022, nearly one-quarter of jobs available in the region are within government services. In recent years, there has been a push to diversify the region’s economy and make it a hub for technology and innovation. The Sacramento region has a highly educated workforce and a growing startup community, and there have been efforts to attract technology companies and entrepreneurs to the area.

**New Housing Expands into Region’s Rural Areas, Increasing Wildfire Risks:** The population growth in the Sacramento Metro Region has been driven by the expansion of housing developments in traditionally rural areas. However, the region’s housing development has been unable to keep up with its growing population. The most significant supply of new housing development has occurred in the wildland-urban interface, wherein wildfire risks are more severe, particularly for new housing.

**Water Scarcity and the Adverse Effects of Aging Infrastructure:** As a primary water source, the Sacramento-San Joaquin Delta is at the heart of California’s $50 billion agricultural economy and the source of drinking water for about 30 million Californians. However, the Delta has been stretched thin, caught between high demand for water and declining supplies. With climate change, a depleted snowpack and an aging water infrastructure demands new methods for storing water.
SAN JOAQUIN VALLEY

Land mass: 27,000 square miles (17% of the state's total land area)
Population: 4.3 million people (11% of the state's total population)
The Sustainability of San Joaquin Valley’s Agricultural Industry: The San Joaquin Valley has long been the agricultural powerhouse for California and the U.S. With its naturally fertile soil, historically inexpensive and prevalent labor sources, and miles of irrigation infrastructure designed to direct water to where it is most needed, California is beginning to experience climate challenges that may affect its agricultural production supremacy.

Air Pollution and Contaminated Water Cause Severe Health Issues: The San Joaquin Valley suffers from negative health outcomes from air pollution, water quality, and lack of access to healthcare. Agriculture is a significant contributor to air pollution and water contaminants due to the use of pesticides, fertilizers, and heavy machinery.

Poverty in Disadvantaged Areas Amidst Urban Sprawl: California’s San Joaquin Valley is one of the most agriculturally rich regions in our nation, contributing over half of the state’s total value in agricultural production. However, it is also home to some of the nation’s poorest communities. Among the poorest and most isolated of these communities are places outside city limits that lack the essential features of a safe, healthy, sustainable neighborhood and infrastructure. People of color are a majority of the population in the San Joaquin Valley, and they make up a disproportionate number of the population in areas that lack investment.
**SIERRA**

**Land mass:** 20,000 square miles (12% of the state’s total land area)

**Population:** 192,000 people (<1% of the state’s total population)
SIERRA REGIONAL DRIVERS SUMMARY:

➡️ **Land Use:** The Sierra region is the least populated in California; however, because of its opportunities for outdoor recreation and tourism, it has a substantial seasonal economy, dependent on low-wage hospitality work. Even though it has abundant land, housing costs throughout the region – particularly in tourist-friendly areas like Mammoth Lakes – have skyrocketed in response to a surge in demand during the pandemic, when residents in nearby urban areas moved or purchased second homes. This has led to a disconnect between available housing and its affordability for local residents.

➡️ **Climate Change:** As a largely remote, forested region, the Sierra’s ecosystem has changed as a consequence of climate change. Longer, more intense fire seasons have led to scarred landscapes, and less tourism. Many residents struggle to insure their homes as fire seasons become a year-long phenomenon; increasingly, insurers are dropping their customers in fire-prone regions, forcing residents in the Sierra to either drop their home insurance altogether, or pay for the state-sponsored program – an expensive option offering limited coverage.

➡️ **Aging Infrastructure:** In California, roughly 20% of households lack access to broadband internet. In the Sierra, a region acutely affected by its lack of consistent, reliable access to broadband, this issue has had multiple negative consequences for its residents: during the pandemic, studies found that students who lacked reliable access to the internet fell behind academically relative to their peers. Moreover, the poor broadband access is often caused by aging infrastructure, which is at heightened fire risk. Although efforts to improve connectivity are ongoing, such projects are costly and take time.
SOUTH COAST

Land mass: 4,800 square miles (3% of the state's total land area)
Population: 13.2 million people (34% of the state's total population)
Present-Day Economic Expansion upon Existing Industry: Building upon the industries that helped shape its early history, the South Coast continues to be an important hub for freight and manufacturing, entertainment, and advanced technology. Home to the nation’s busiest port, the region moves roughly $300 billion in cargo annually, while its entertainment industry draws more than $2.5 billion in statewide spending for film and television production. Moreover, the South Coast is home to a number of higher-education institutions, which feed into industries including aerospace and technology.

Effects of Climate Change: Water, Heat and Energy: Across California, residents are reckoning with the effects of a warming climate. In Southern California, such effects include a tightening water supply and increasingly frequent and intense heat waves. Oftentimes, those who are affected most are low-income, and non-English speaking communities, unable to afford the rising costs of air conditioning, or living in highly-industrialized neighborhoods that lack adequate tree cover, which offer significant cooling benefits.

Housing, Migration, and the Shrinking Middle Class: For years, California has gradually been losing more residents than it brings in, leading to a net loss primarily among lower- and middle-income adults. The region’s high cost of housing, due in part to the region’s zoning largely for single-family homes, and wage stagnation among low- and middle-income residents, however, has made housing even more affordable. Concurrently, the region faces some of the highest levels of homelessness in the country, an issue that has plagued Southern California for decades.
SOUTHERN BORDER

Land mass: 8,700 square miles (5% of the state’s total land area)
Population: 3.5 million people (9% of the state’s total population)
SOUTHERN BORDER
REGIONAL DRIVERS SUMMARY:

Water Shortages and Climate Change: The Imperial Valley, located along the eastern side of California, has long supported an agricultural economy, irrigated by the Colorado River. However, as the Colorado River progressively loses volume due to a warming climate and worsening drought, its farmers’ dependence on a dwindling water supply is a cause for concern for the region’s economy. Nearby San Diego County has responded by investing in a desalination plant with the goal of producing half of the county’s water supply by 2035; however, impending water restrictions may prove disastrous for Imperial County’s economy.

Diversifying Industry: Both Counties in the Southern Border region continue to rely on the industries that have long supported their economies: for Imperial County, agriculture remains dominant, and in San Diego, manufacturing and the military are still core to the economy. In recent history, San Diego has more successfully diversified its economy, and is now home to a number of life sciences, biotechnology, and telecommunications companies. Imperial County, however, is still highly dependent on agriculture, with roughly 1 in 6 residents employed by the industry.

Transnational Identity: The Southern Border region and Northern Mexico have a long history of economic interconnectivity, with strong trade relationships and a shared workforce to form what is referred to as the “Cali Baja Megaregion.” San Diego’s life science industry, for example, often collaborates with Tijuana, which is known as the medical device manufacturing capital of Mexico. Recently, the two regions were recognized as the 2024 World Design Capital for their economic, social, and environmental designs, and have signed a collaboration agreement to work on issues such as public safety, border wait times, and environmental issues.