

2021 Regional Progress Report

How the Greater Sacramento region is
tracking on key measures of economic
prosperity, vibrant places, and
connected communities



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The Regional Progress Report tracks change across economic growth, development, travel, and other important indicators in the Sacramento region. By assessing where the region is on a range of key topics the Progress Report serves as a first step for updating the Metropolitan Transportation Plan/Sustainable Communities Strategy (MTP/SCS), SACOG's long-range plan updated every four years to pro-actively link land use, air quality, and transportation needs in the Sacramento region. The Progress Report is provided in part to help identify important issues that should be prioritized in the next MTP/SCS update, currently slated to be adopted in 2024.

Given the breadth and range of indicators covered, the Progress Report focuses on documenting trends and change through time, not on delving into causative factors. In other words, the report is meant to shed light on indicators that are important to the success of the MTP/SCS, and whether the region is moving in the right direction to meet these metrics. And by identifying those areas where the region seems to be lagging, the Progress Report can help set up not only what needs to be better understood, but also potential areas of focus for the policies and priorities of the MTP/SCS.

SACOG last updated the Regional Progress Report in 2017, exploring questions such as how the region had recovered from the Great Recession compared to our California peers or the trends within key development metrics. In this updated version SACOG has incorporated new questions, emerging data sets, and novel ways to display and report on regionally significant findings.

The 2021 Progress Report opens by exploring **Who We Are**, delving into population, demographics, and other foundational indicators that help explain the unique makeup of the six-county Sacramento region of El Dorado, Placer, Sacramento, Sutter, Yolo, and Yuba counties (see the "About the Data" section at the end of this document for more detail on how the report defines the Sacramento region). Next, a section on **Economic Prosperity** explores the regional economy from a lens of growth, innovation, and inclusion. Such indications help illuminate, for example, how the region's recent job growth compares to peer regions, or existing disparities within the regional economy.

The **Vibrant Places** theme looks at development, housing production, and affordability. These indicators can help answer questions such as: has the region's housing production rebounded from the recession or is the region growing in a manner envisioned by the Blueprint, SACOG's 2004 smart growth vision for the region? Finally, SACOG tracks a wide number of transportation-related metrics. Contained within the Progress Report's **Connected Communities** section, these indicators look to the changing experience of regional residents in using the transportation system.

Who we are

- Population growth in the state has shifted from the coast to valley and foothills: Sacramento and San Joaquin are now the fastest growing regions in the state, both on a percentage and absolute level. But these inland regions continue to lag the coast in multifamily and attached housing production, as key barriers for infill persist. Efforts like Green Means Go are needed to ensure growth in the region is consistent with the state's climate and other broader goals.
- The region continues to become more diverse in its population and demographics, and is now almost 50 percent people of color.
- Yet disparities by race/ethnicity persist and will likely only widen unless the region addresses head on. Key disparities by race/ethnicity highlighted in the progress report include educational attainment, household income, and housing-cost burden.

Economic prosperity

- The jobs gained since the Great Recession (in healthcare, education, leisure/hospitality) have been different than the jobs lost (in manufacturing, finance, local government). Overall, the region has seen a shift towards locally-serving industries.
- The health sector has been the fastest growing part of the regional economy (growing faster than the national rate). Yet the region needs other sectors, especially tradable industries, to better diversify the economy. In addition to health, the Prosperity Strategy highlights food/agriculture and innovative mobility as other areas of promise for the region.
- Covid-19 and the associated shelter-in-place efforts have had a pronounced impact on both the regional economy and travel. The jobs lost in early 2020 greatly outpaced what was witnessed during the last recession, while travel in early 2020 was about half of normal. Equally pronounced though has been the recent rebound in both employment and vehicle miles traveled. It is still too soon however to know if this represents a temporary blip or will lead to structural changes in the regional economy and travel behavior.

Vibrant places

- The region has made strides in recent years in increasing and diversifying its housing stock, in particular in small lot single family housing. But despite modest improvements, the region continues to underproduce attached and infill housing in relation to MTP/SCS goals and despite having ample land designated for attached housing.
- The region is heavily housing-cost burdened: over one third of Sacramento region households pay more than 30 percent of gross monthly income on housing. Part of this stems from wages/income, which need to keep up with rising housing costs. But the region is also underproducing housing in relation to population growth, which puts upward pressure on prices.

Connected communities

- Compared to other mid-sized peer areas, the Sacramento region does well on system congestion and reliability, yet state of good repair and collision indicators are going in the wrong direction. The next MTP/SCS will explore how much of the plan's investment budget should be directed towards expansion projects compared to system maintenance and modernization.
- The biggest changes in commute patterns have been a decrease in carpooling and an increase in work-from-home. The share of commuters driving to work remains almost unchanged the last 20 years. And while transit is essential in meeting the performance outcomes of the MTP/SCS, transit boardings in the region have dropped (as they have in other regions). Efforts such as Next Gen Transit and other important regional initiatives look to the future of transit in the region, while an important question for the next MTP/SCS is how much the region has invested across different parts of the transportation system.

The six-county Sacramento region exemplifies physical, cultural, and economic diversity. Its landscapes range from fertile agricultural lands to the high Sierra Nevada mountains, encompassing a vibrant collection of small towns, established and emerging suburbs, and an urban core that houses the capital of the fifth largest economy in the world. The people that call this region home and the communities where they live are a further reflection of the growing diversity of the state and nation. The Progress Report opens by looking at who we are and what makes this region unique, delving into recent demographic trends as well as how the region situates within the larger state.

Who We Are key findings:

- Growth in the state has shifted from the coast to valley and foothills: Sacramento and San Joaquin are now the fastest growing regions in the state, both on a percentage and absolute level. But these inland regions continue to lag the coast in multifamily and attached housing production, as key barriers for infill persist. Efforts like Green Means Go are needed to ensure growth in the region is consistent with the state's climate and other broader goals.
- The region continues to become more diverse in its population and demographics, and is now almost 50 percent people of color.
- Yet disparities by race/ethnicity persist and will likely only widen unless the region addresses head on. Key disparities by race/ethnicity highlighted in the progress report include educational attainment and household income.
- Over one third of the Sacramento region is housing-cost burdened, with the rate even higher for Black and Hispanic households.

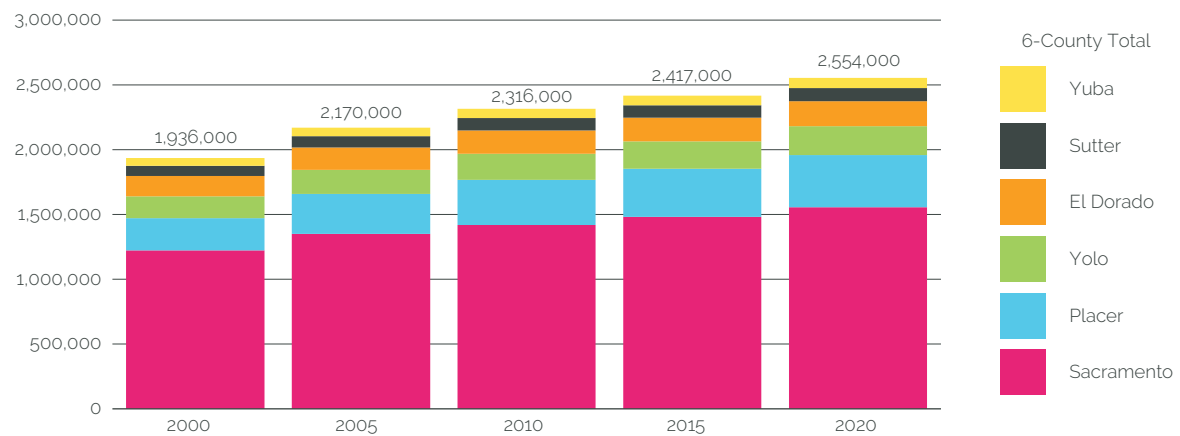
Region's population growing...but rate of growth slowing

The 2017 Regional Progress Report showed population growth in the Sacramento region had dropped from its high (over 50,000 a year) to less than 20,000 a year during the Great Recession.

In the last five years, the region's population growth has steadied, adding between 25,000 to 30,000 new residents per year.

Who We Are Figure 1. Total Population by County, 2000 to 2020

6-County Sacramento Region



Source: SACOG, December 2020. Based on population estimates from the California Department of Finance.

Who We Are Table 1. Population Growth, 2000 to 2020

County	Annual Average Growth Rate			
	2000-2005	2005-2010	2010-2015	2015-2020
Sacramento	2.0%	1.0%	0.9%	1.0%
Placer	4.4%	2.5%	1.3%	1.7%
Yolo	2.0%	1.5%	1.0%	1.0%
El Dorado	1.9%	1.1%	0.2%	1.1%
Sutter	2.0%	1.7%	0.3%	1.0%
Yuba	2.0%	1.7%	0.5%	1.3%
6-County Total	2.3%	1.3%	0.9%	1.1%

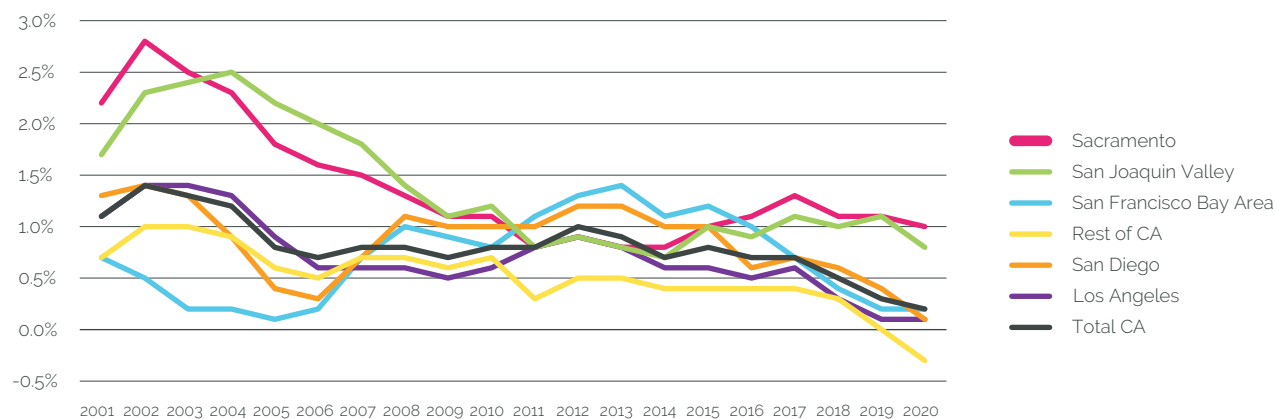
Source: SACOG, December 2020. Based on population estimates from the California Department of Finance.

As coastal growth slows, Sacramento region becomes fastest growing in California

State-wide growth has shrunk significantly over the last several years: at 0.2% annually, population growth in the state has never been lower.

The Sacramento region's steady population growth the last five years places the region as the fastest growing in the state, as population growth has shifted inland: Sacramento and the San Joaquin Valley have reclaimed their status as the fastest-growing California regions, not only on a percentage but on an absolute basis.

Who We Are Figure 2. Annual Population Growth, Sacramento Region and Other California Regions, 2000 to 2020

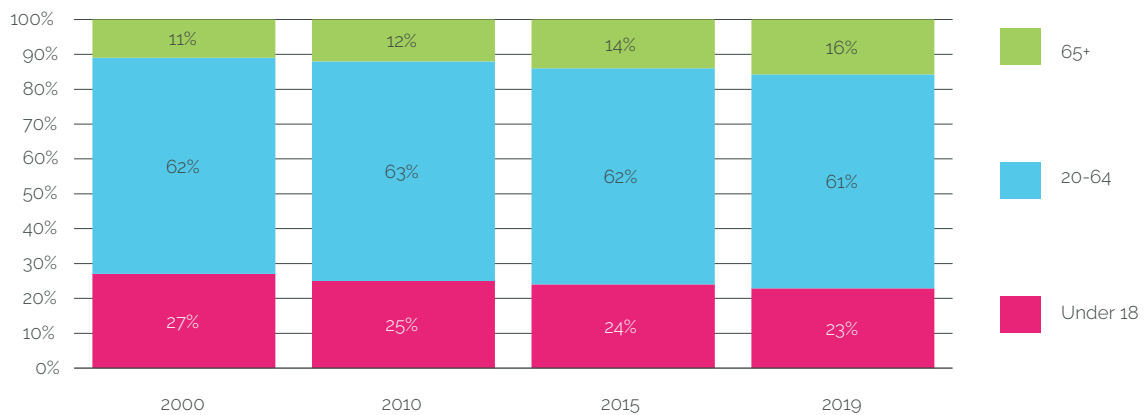


Source: SACOG, December 2020. Based on DOF/DRU E-5 series.

Region is getting older

The region continues to age. Those aged 65 or older consisted of 11% of the resident population in 2000 but were 16% of the population by 2019. In the meantime, the share of residents younger than 18 continues to shrink, from 27% in 2000 to 23% by 2019.

Who We Are Figure 3. Population Age Distribution in the Sacramento Region, 2000 to 2019



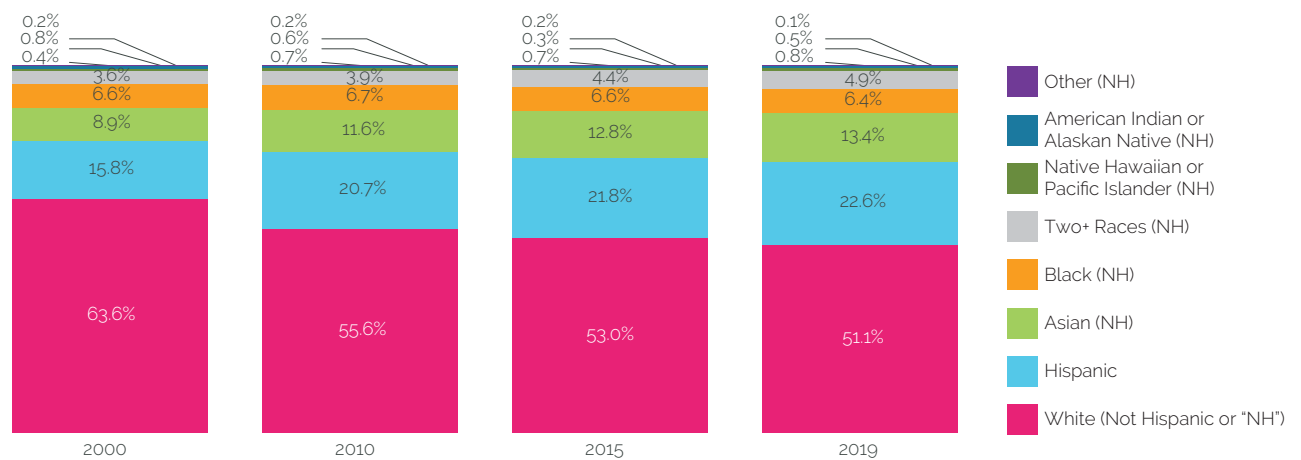
Source: SACOG, December 2020. Based on year 2000 and 2010 Decennial Census, and American Community Survey 2015 and 2019 1-year sample.

Region on the cusp of becoming more than 50 percent people of color

The Sacramento region continues to grow in diversity. In 2000, 64% of all residents in the region were non-Hispanic white. By 2019 this had shrunk to 51%. The region's Black population has remained around 6.5% the last 20 years. Hispanic and Asian populations continue to grow steadily.

Who We Are Figure 4. Race and Ethnicity in the Sacramento Region, 2000 to 2019

6-County Sacramento Region



Source: SACOG, December 2020. Based on Census and American Community Survey data.

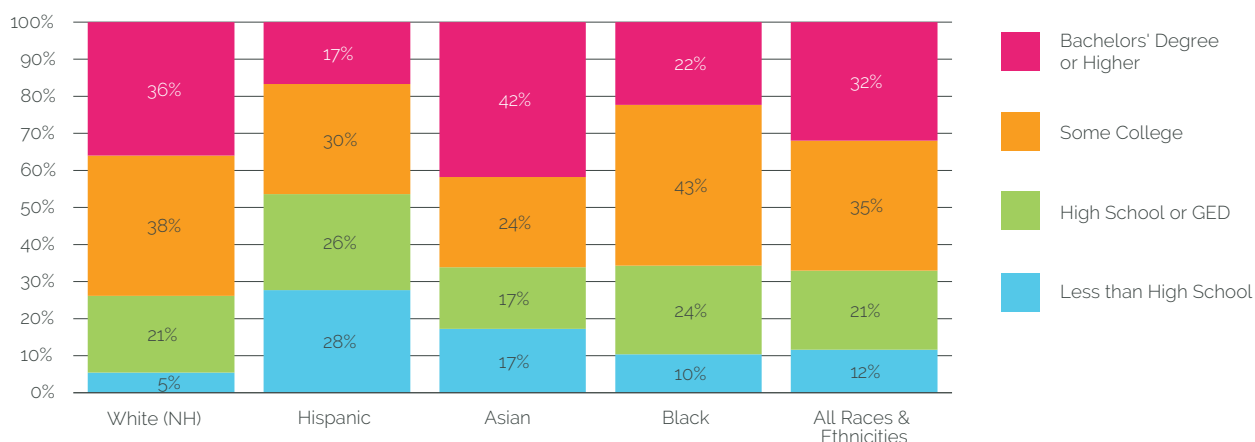
Notes: "NH" = non-Hispanic origin. Hispanic population includes population of all races that also reported Hispanic origin. See discussion in "About the Data" chapter of this report.

Education attainment illustrates disparity in Sacramento region

There are significant differences in the highest level of educational attainment when the residents of the region 26 years-or-older are grouped by their reported race and ethnicity. Although there has been progress in closing the educational attainment gap (for example, the percentage of Hispanic residents aged 26+ with less than a high school education has dropped by 8 percentage points since 2010), white non-Hispanic and Asian populations make up the highest share with bachelor's degrees or higher. Higher educational attainment is correlated with higher incomes and labor force participation rates.

Who We Are Figure 5. Education Attainment for Persons Aged 26+, 2018

6-County Sacramento Region



Source: SACOG, December 2020. Based on American Community Survey 2018 5-year sample. Statistic in the paragraph compares to the 2010 5-year sample.

Notes: "NH" = non-Hispanic origin. Data for American Indian, Alaskan Native, Native Hawaiian, Pacific Islander, Multi-Race, or the Census' other race/ethnicity categories is not included because of the high margin of error due to smaller sample sizes. See discussion in "About the Data" chapter of this report.

Disparity also seen in labor force participation

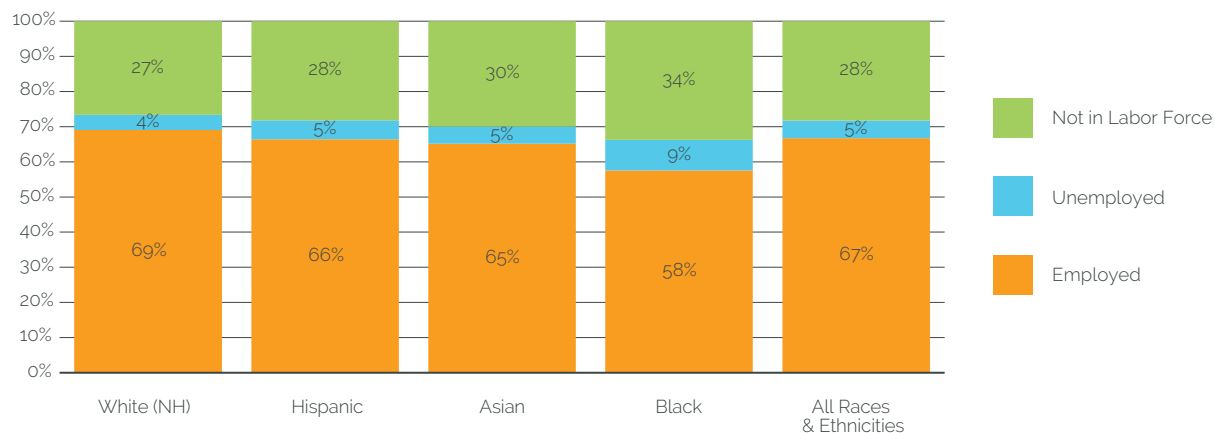
Census data organizes the working age (aged 16 to 64) labor force into three components:

- Employed (those currently employed)
- Unemployed (those not employed but actively looking for work), and
- Not in labor force (not actively seeking employment or are employed outside the official labor market)

The Brookings study "[Charting a course to the Sacramento region's future economic prosperity](#)" noted employment rates (ratio of employed to working age population) differ by race/ethnicity, a finding also seen in the last five years of labor force data in the Sacramento region.

The reasons individuals are not participating in the formal labor force vary greatly. Some are pursuing educational or training opportunities while others are involved in work that occurs outside of the official labor market (home maker, family care, etc.). Many though are discouraged workers — those who want to work but have given up trying to find employment due to repeated unsuccess or unequal access to opportunities.

Who We Are Figure 6. Working Age (Age 16-64) Labor Force in Sacramento Region by Race/Ethnicity, 2018



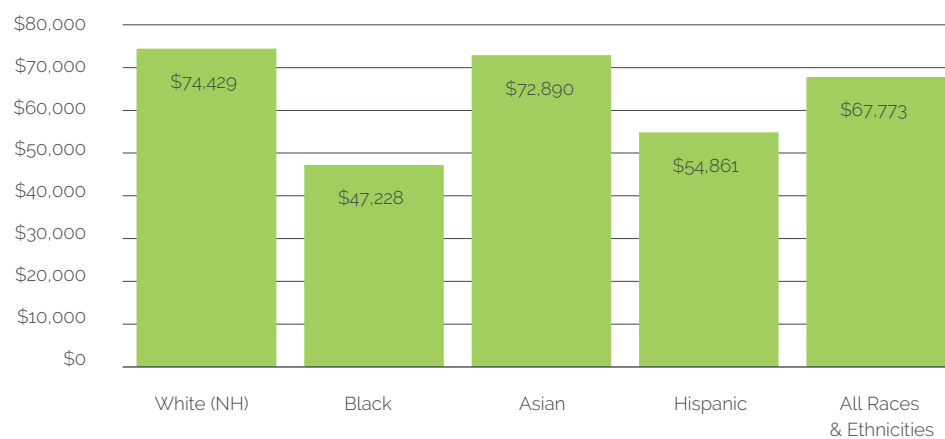
Source: SACOG, December 2020 based on the 2018 American Community Survey 5-year sample. Data for American Indian, Alaskan Native, Native Hawaiian, Pacific Islander, Multi-Race, or the Census' other race/ethnicity categories is not included because of the high margin of error due to smaller sample size. See discussion in "About the Data" chapter of this report.

Disparities in education attainment and labor force participation reflected in income

Non-Hispanic white and Asian households in the region have higher median incomes compared to Black and Hispanic households. Put another way, the median income of Black households in the region is only 70% of total households, while median incomes of white households exceed 110% of the regional level.

Who We Are Figure 7. Median Annual Household Income by Race and Ethnicity in Sacramento Region, 2018

6-County Sacramento Region



Source: SACOG, December 2020. Based on American Community Survey 2018 5-year sample data.

Notes: "NH" = non-Hispanic origin. Data for American Indian, Alaskan Native, Native Hawaiian, Pacific Islander, Multi-Race, or the Census' other race/ethnicity categories is not included because of the high margin of error due to smaller sample sizes. See discussion in "About the Data" chapter of this report.

Disparities in income reflected in housing-cost burden

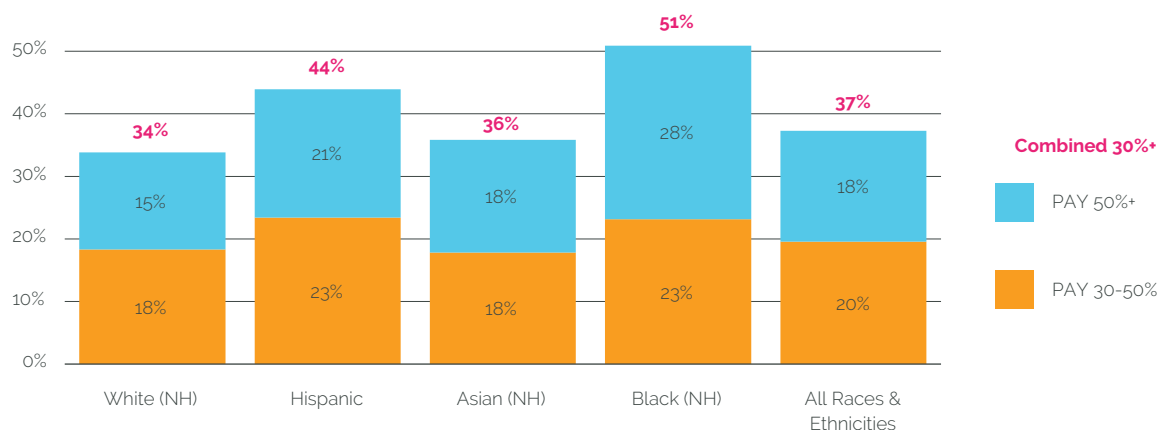
Well over one third of all households in the Sacramento region are housing-cost burdened, defined as those households that spend more than a third of gross monthly income on the cost of housing.

And there are clear disparities in housing-cost burden by race/ethnicity, given the differences in household incomes. Hispanic and Black households must contribute a higher share of income to cover basic housing costs compared to white and Asian households. Indeed, over half of all Black households in the region are housing-cost burdened (and over half of these households pay above 50 percent of gross income just to cover housing).

Contributing such a high percentage of gross income towards housing leaves little left over for saving or discretionary spending. The Economic Prosperity section of this Progress Report tracks the increasing housing costs in the region while the Vibrant Places section calls attention to underproduction of different housing product types.

Who We Are Figure 8. Housing-cost burden by Race and Ethnicity, 2016

6-County Sacramento Region



Source: 2016 Comprehensive Housing Affordability Strategy (CHAS) data, HUD. Data for American Indian, Alaskan Native, Native Hawaiian, Pacific Islander, Multi-Race, or the Census' other race/ethnicity categories is not included because of the high margin of error due to smaller sample sizes. See discussion in "About the Data" chapter of this report.

The goal of “Economic Prosperity” means developing a diversified and inclusive regional economy by supporting the expansion of key economic clusters including agriculture and food, health sciences, and innovative mobility. It also means supporting development that provides a high quality of life for all and is attractive to both new and existing businesses. The region's Prosperity Strategy lays out a pathway for a more aligned, prosperous, and resilient Sacramento region. Importantly, the strategy argues that a truly prosperous region must tackle both growth (e.g., increasing jobs, household incomes) and inclusion (e.g., reducing disparities, providing equal access to opportunities). This report provides indicators of how the region has fared within these two economic prosperity themes.

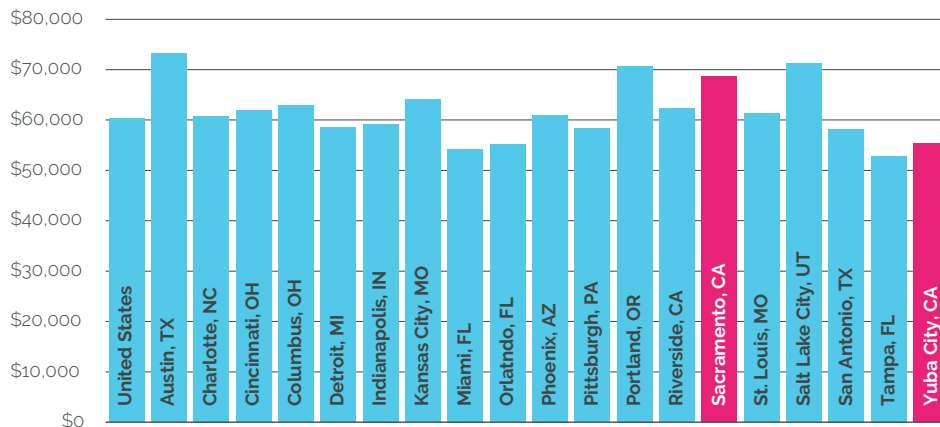
Economic Prosperity key findings:

- The jobs gained since the Great Recession (in healthcare, education, leisure/hospitality) have been different than the jobs lost (in manufacturing, finance, local government). Overall, the region has seen a shift towards locally-serving industries.
- The health sector has been the fastest growing part of the regional economy in terms of employment (and growing faster than the national rate). Yet the region needs other sectors, especially tradable industries, to better diversify the economy. In addition to health, the [Prosperity Strategy](#) highlights food/agriculture and innovative mobility as other areas of promise for the Sacramento region.
- High and rising housing costs offset the region's relatively high median wages. Renters are especially vulnerable to housing-cost burden. Wages need to keep up with housing costs, else housing-cost burden will increase.
- Recent output growth in the region has been promising, though a lack of new young firms could be a damper on the region's innovative economy.
- Covid-19 and the associated shelter-in-place efforts have had a pronounced impact on the regional economy. The jobs lost in early 2020 greatly outpaced what was witnessed during the last recession. Equally pronounced though has been the recent employment rebound. It is still too soon however to know if the employment rollercoaster represents a temporary blip or will lead to structural changes in the regional economy.

Region's household income among highest of mid-sized regions

The Sacramento region's economy remains relatively prosperous. Only three of the 19 studied mid-sized regions had higher median household incomes than greater Sacramento, though incomes in Yuba and Sutter trail the rest of the region.

Economic Prosperity Figure 1. 2018 Median Household Income by Region

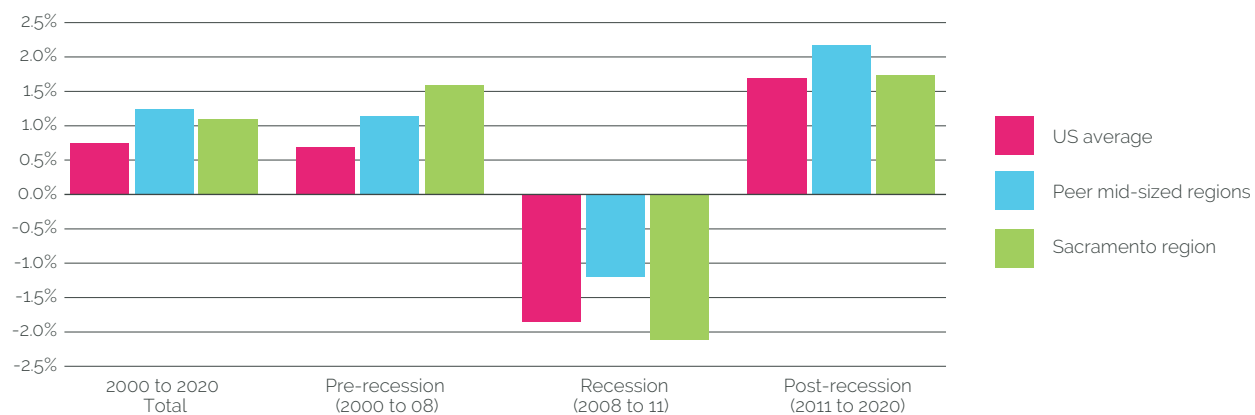


Source: SACOG, December 2020 based on the 2018 American Community Survey five-year sample for metropolitan statistical areas.

But recent job growth lags other mid-sized metro areas

The Sacramento region's job growth was relatively stronger prior to the recession (ranking seventh among peers), but post-recession has not kept up with its fellow mid-sized regions. Notably, the region has fallen to 14 out of 19 in its peer group of mid-sized regions in the post-recession job growth rate, and the Sacramento regional rate now mirrors that of the nation as a whole.

Economic Prosperity Figure 2. Annual Job Growth Comparison: Sacramento and other Mid-Sized Metro Areas



Source: SACOG analysis of Current Employment Survey (CES) data from the US Bureau of Labor Statistics (BLS).

Covid-19 has pronounced near-term effect on employment

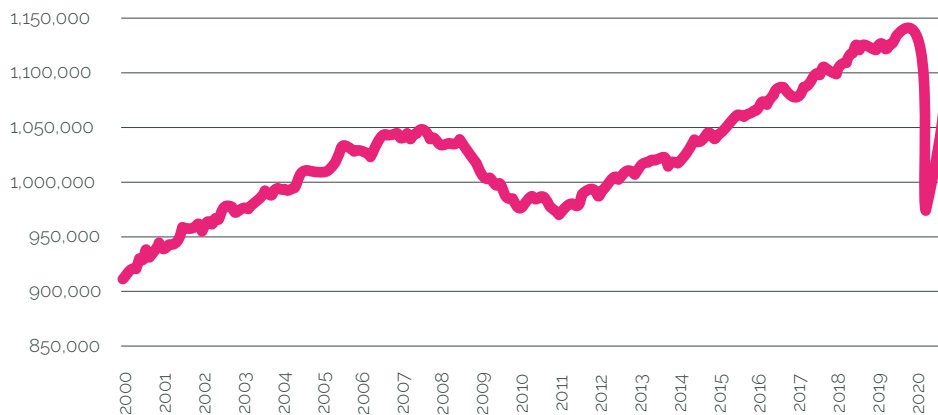
As in the nation and other mid-sized regions, Covid-19 has had stark near-term impacts on the number of jobs in our region, which dropped about 15% in the early part of the year. While fellow regions also have witnessed drastic declines in jobs, the speed of this job loss greatly outpaces what was witnessed in the Great Recession.

Since the nadir in April of 2020, job levels have steadily rebounded, and now stand at about 5% less than the beginning of the year. The Sacramento region closely mirrors the U.S. in this trend.

It's still too soon to tell if the job loss and rebound represent a temporary blip or a more structural change in both the regional and national economy like was seen in 2008 and 2009.

Economic Prosperity Figure 3. Total Jobs in the Sacramento Region by Month:

January 2000 to October 2020



Source: SACOG analysis of Current Employment Survey (CES) data from the US Bureau of Labor Statistics (BLS). Job estimates for October of 2020 are preliminary.

Regional economy dominated by government, health, and education sectors

Over 40% of regional employment is in just three sectors: government, healthcare, and education.

Location quotient (LQ) is a method to gauge regional concentration by sector. The measure compares the concentration of employment in an industry in the Sacramento region to the same industry's concentration in the national economy. LQ values above 1 signify areas where the region is more concentrated than the nation. The only industry with a noticeable regional concentration (besides of course the incredibly high LQ in state government) is the non-base construction industry.

The region's Prosperity Strategy highlights the food/agriculture cluster, health sciences, and innovative mobility as promising areas for growth. While the region has a lower concentration of farm employment relative to the nation, work under SACOG's Rural-Urban Connections Strategy program has shown the broader food/ag cluster contributes over \$7 billion annually to the regional economy. Health is one of the fastest growing parts of the economy, with the Prosperity Strategy emphasizing the need to focus on the tradable component of that sector. Finally, innovative mobility is an emerging activity that spans multiple sectors (i.e., is too small and broad to be measured in these top-level sector groupings). However, the region's lower concentration in manufacturing could be a challenge for work underway to grow this cluster.

Economic Prosperity Table 1. Sacramento Region Employment Mix, 2020

Sector	% of Regional Employment	Location Quotient
Construction	6%	1.21
Education and Health	16%	1.04
Farm	1%	0.63
Federal Government	1%	0.78
Finance	5%	0.89
Information	1%	0.59
Leisure and Hospitality	10%	0.97
Local government	11%	1.14
Manufacturing	4%	0.44
Other Services	3%	0.77
Professional and Business Services	13%	0.93
Retail	10%	0.97
State Government	12%	3.44
Transportation, Warehouse, Wholesale, Utilities	6%	0.79

Source: SACOG analysis of EDD Industry Employment & Labor Force benchmark series for regional employment and BLS Employment by Major Industry Sector data series for national location quotient comparison.

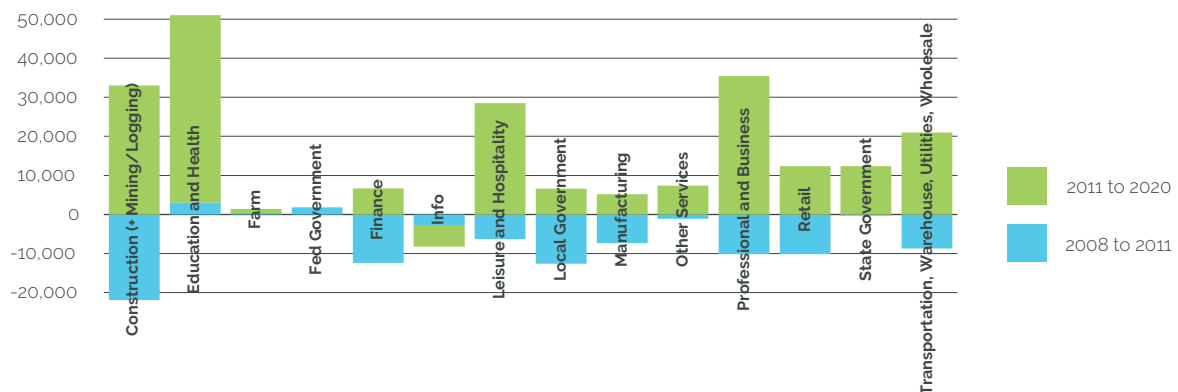
Health/education the fastest growing sector in region, while manufacturing, local government, and finance sectors lag

The jobs gained since the Great Recession (in healthcare, education, leisure/hospitality) have been different than the jobs lost (in manufacturing, finance, local government). Overall, the region has seen a shift towards locally-serving industries.

- The construction sector was the hardest hit industry in the region by far during the recession. The sector has come back since, with especially high employment growth in the last few years. In contrast, neither the finance, manufacturing or local government sectors have regained their pre-recession employment levels.
- The fastest job gainers since the recession (in addition to construction's recovery mentioned above) come from the education/healthcare, leisure/hospitality, and professional/business service sectors, continuing the shift towards service sector employment.
- These job totals predate the mid 2020 drop in employment, which affected leisure, hospitality, retail and other services most heavily.

Economic Prosperity Figure 4. Job Change in Sacramento Region by Sector:

Recession and Recovery Periods



Source: SACOG analysis of EDD sector data from January 2008 to January 2020.

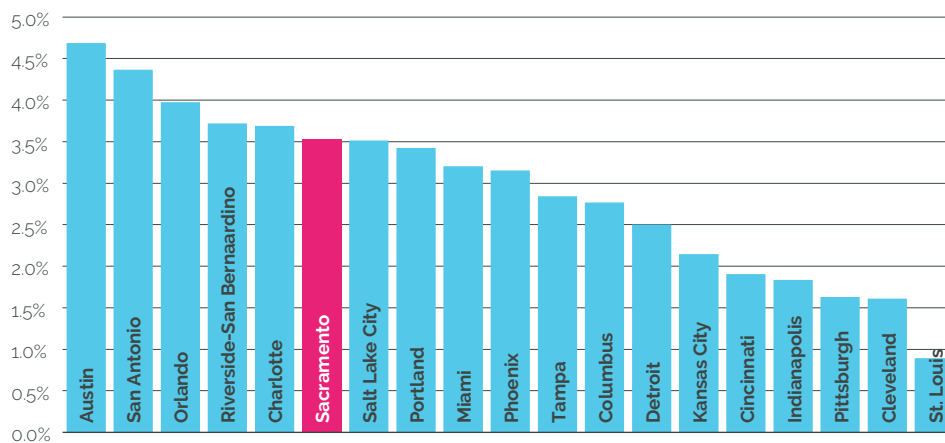
Recent GRP growth in Sacramento region in top third of peer group

Employment change only tells half the story of trends in the regional economy. Gross regional product (GRP) measures the size of the regional economy by totaling the market value of all final goods and services produced in the region. GRP is a good complement to total jobs in that it reflects output and productivity, not just number of jobs. A look at real GRP allows us to ask: is the regional economy growing on an inflation-adjusted basis?

While post-recession job growth in greater Sacramento has trailed peer regions (14th out of 18 regions), annual real GRP growth in the Sacramento region between 2011 and 2018 averaged 3.5%, or 6th in its peer group over this time.

Economic Prosperity Figure 5. Real Annual GRP Growth: 2011 to 2018

Sacramento Region compared to Mid-sized Peers



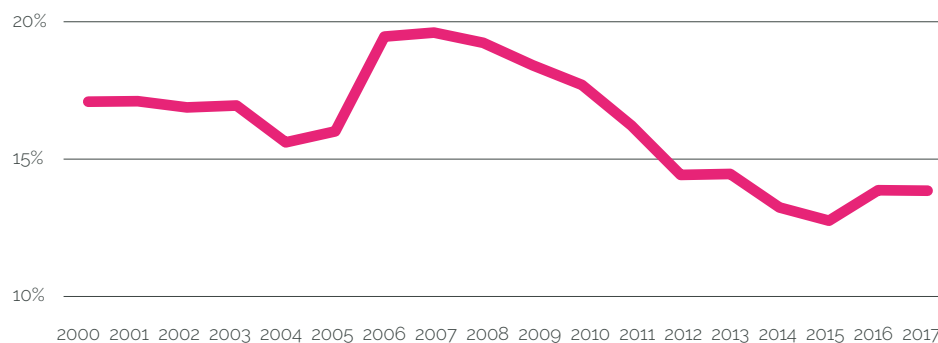
Source: SACOG compilation of Gross Domestic Product at MSA level data series from the BEA.

Yet startup and firm scaling could be lagging in the Sacramento region

Work by the Brookings Institution for the Sacramento region notes the proportion of employment in young firms (firms in existence five years or fewer) compared to total regional employment is a useful indicator of innovation and startup activity. It can serve as a proxy for the dynamism of the region's startup and scale-up activity.

The region has lagged somewhat in employment opportunities at new startup firms relative to the overall economy and to other metropolitan areas. While some of the young firms of prior years have scaled and are now successful established firms, the lack of new young firms in the region could be a damper on the innovative economy. The Prosperity Strategy includes near and longer-term priorities to build out the region's innovative economy.

Economic Prosperity Figure 6. Percent of Sacramento Regional Employment in Firms Less than Five Years Old



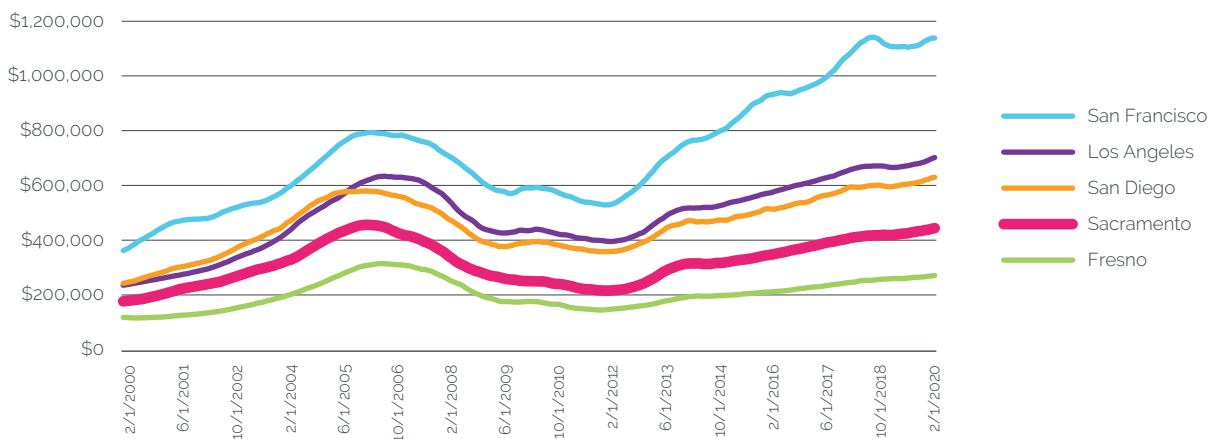
Source: SACOG analysis of LED extraction tool of Quarterly Workforce Indicators series

Housing prices in Sacramento region lower than coastal areas but high from national perspective

The Sacramento region is like many other California areas, where home values have just re-reached (or are almost back to) pre-recession levels on an inflation-adjusted basis. The outlier is the Bay Area, where home values have greatly outpaced inflation, and are now around 50% higher than the peak before the recession.

While housing in the Sacramento region is less expensive relative to the large coastal areas of the state, it is more expensive compared to the nation at large. Zillow estimates the typical value of homes in the United States at about \$262,000, compared to about \$440,000 in the Sacramento MSA. As more people move to the region from high-cost coastal areas, the upward pressure on housing-cost burden will likely increase.

Economic Prosperity Figure 7. Median Home Values by California Metropolitan Statistical Areas (in \$2020)



Source: SACOG analysis of Zillow monthly median home values by metro area, January 2000 to April 2020.

Calculation of home values uses the 35th to 65th percentile by month, and is compiled at the MSA level (so includes the Sacramento MSA but not the Yuba City MSA) and is chained in 2020 dollars.

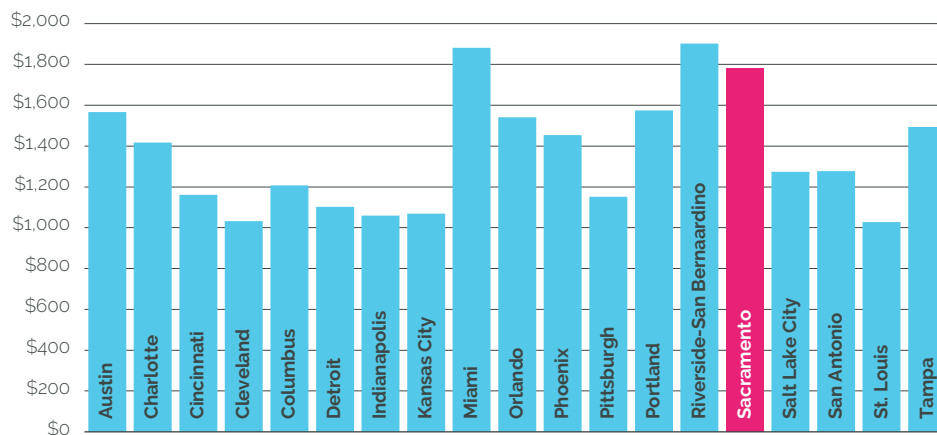
While home values have steadily recovered, rents have skyrocketed

Sacramento is an expensive market for renters compared to other mid-sized areas. Of its peer group, only Miami and Riverside/San Bernardino have higher median rents.

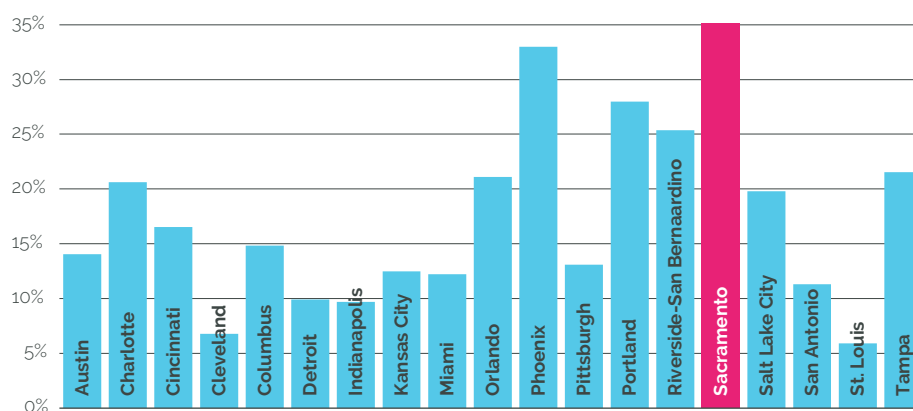
And rents are growing rapidly here. Between 2014 and 2020, Sacramento metro area rents have increased at a greater rate than all the other mid-sized peer regions analyzed in this progress report.

High home and rental costs lead to the significant regional housing-cost burden noted in the opening. Indeed, almost half of all renters in the region pay more than 30% of gross monthly income to cover rent.

Economic Prosperity Figure 8a. Average Rents (April 2020) by Metro Area



Economic Prosperity Figure 8b. Rent Increase between January 2014 and January 2020



Source: SACOG analysis of Zillow monthly average rent between 2014 and 2020, for MSA. Measure is calculation of average rent in the 40 to 60th percentile. Data for Sacramento region only includes the Sacramento MSA, not the Yuba City MSA.

The second of SACOG's three key goals, Vibrant Places means ensuring the region's growth patterns enhance the vitality of existing communities and foster multi-modal mobility. We want to ensure new development encourages a healthy mix of uses that include a diversity of housing, businesses, essential services, and amenities near one another.

Vibrant Places key findings:

- The region is heavily housing-cost burdened. Part of this stems from wages and income, but the region is also underproducing housing in relation to population growth, which puts upward pressure on prices.
- Not only the total number, but the type and location of housing matters. During the early 2000s the region produced upwards of 20,000 new housing units per year, but also lost prime agricultural land at an alarming rate. Efforts such as the Sacramento Region Blueprint showed how such growth would be unsustainable from a fiscal, economic, and environmental perspective, especially as the food/agriculture cluster is a leading tradable component of the regional economy.
- The region has made strides in recent years in increasing and diversifying its housing stock, particularly in small-lot single-family housing. But despite modest improvements, the region continues to underproduce attached and infill housing in relation to MTP/SCS goals and despite having ample land designated for attached housing. The region's Green Means Go initiative aims to tackle barriers to multifamily and infill development in greater Sacramento.

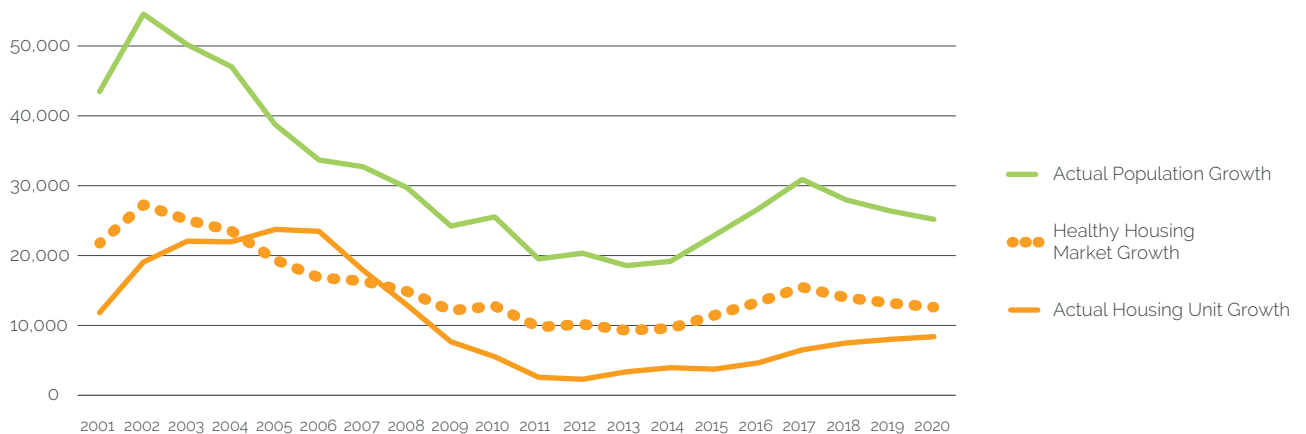
Housing production not keeping up with population growth

Housing production in the region continues to lag population, although it has risen slightly over the last several years. However, production is still not keeping up with what is needed relative to population growth.

From 2009 onward the region has added about 65,000 new housing units. The region would have needed to add an additional 80,000 units in that timeframe (or about 6,500 more units per year above what is has been building) just to meet the new population growth.

This indicator only compares new housing to new population and does not account for any existing housing shortage. Each year the region underproduces housing adds to the cumulative impact of the housing shortage.

Vibrant Places Figure 1. Annual Population and Housing Unit Growth in Sacramento Region



Source: SACOG analysis of DOF E-5 annual population and housing estimates. "Healthy housing market growth" is defined as 1 new housing unit to 2 new residents (or 0.5 new units per new resident) using a static 5% vacancy rate assumption. Importantly, the indicator doesn't account for an existing housing shortage (for example, SACOG's analysis for the 2021 Regional Housing Needs Allocation found the region had an overcrowding rate of nearly 4.5%), just measuring new housing to new population growth. Some of the other housing indicators in the progress report use the separate SACOG permit database, which differs slightly to the DOF in geography and based on when jurisdictions report new housing starts compared to when the housing is built.

Largest shortfall between actual housing production and regional goals is in attached housing product

Most of the new growth in the housing boom of the early 2000s came in the form of large single-family homes, largely in developments entitled decades prior.

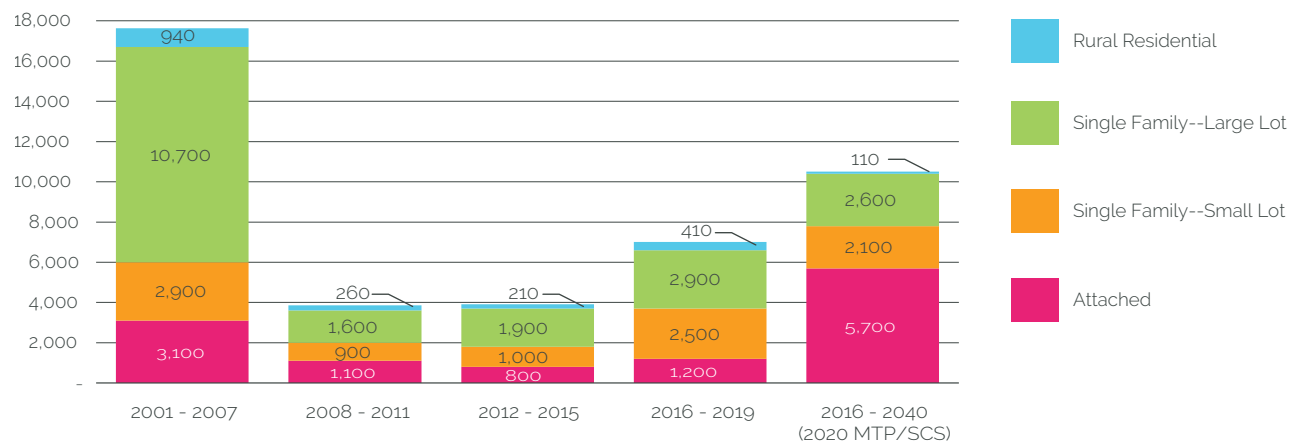
More recently, rural residential and large-lot product types account for less than half of new homes built. The largest noticeable shift in housing product the last ten years has been growth in small-lot single-family as a percentage of all new homes built, with much of this from new plans entitled in the last 15 years.

While the trend of denser housing helps toward the goal of more compact development and housing choice, the region still has a long way to go to meet the outcomes of the MTP/SCS, which suggests that 54 % of the new homes the region builds should be in attached product (e.g., apartments, townhomes, duplexes), and much of this as infill in existing communities. The region's share of new attached product in relation to all new housing starts stands little changed from early 20 years ago and trails the early part of the 2000s in terms of absolute attached units built.

Housing product type examples:

Attached (Rental and Owned)	Single-Family Small-Lot (<5500 sq ft lot size)	Single-Family Large-Lot (1/4 -1 acre lot size)	Single-Family Rural Residential (1 acre or larger per lot)
			
			

Vibrant Places Figure 2. Annual New Dwelling Units by Product Type compared to MTP/SCS Goals



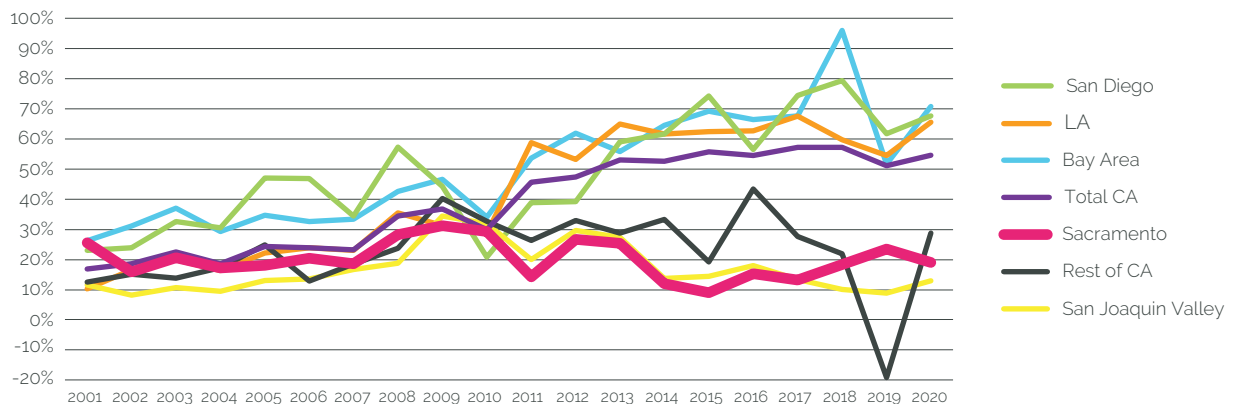
Source: SACOG analysis of regional permits database and SACOG MTP/SCS Land Use Forecast for 2016 to 2040. Note the final column (MTP 2020) represents the average annual new dwelling units forecasted in the 2020 MTP/SCS. Totals are for the SACOG region only, so do not include the Tahoe Basin of Placer and El Dorado Counties. See the "About the Data" section at end of document for more details.

Unlike Sacramento, other California regions increasing share of attached product

The Sacramento region (and also the San Joaquin Valley) continue to differ from the other large California regions that produce a much higher percentage of multifamily housing units (multifamily includes not only apartments but also products such as townhomes, duplexes, etc.).

In 2001, the Sacramento region was tied with the Bay Area with the highest percentage of new multifamily units in the state. Since then, however, the coastal regions have greatly increased their share of multifamily as new construction, while the share in Sacramento has slightly declined. In other words, the Sacramento region continues to miss out on the coastal “attached product boom.” While the region has ample multifamily zoning, challenges could be in part due to requirements/barriers within multifamily zoning codes, such as setbacks, parking, etc.

Vibrant Places Figure 3. Percent of Total New Units that are Multi-Family by California Region



Source: SACOG analysis of DOF/DRU E-5 series. The negative numbers for 2019 in rest of CA represent the large number of housing units that burned down. The DOF dataset does not separate out demolitions in this data set from new growth, so it measures a slightly different total from the regional permit database used above.

Underproduction of attached product exacerbates housing-cost burden, especially for low-income residents

The Regional Housing Needs Assessment (RHNA) is a process that quantifies the need for housing by income category and sets housing goals for jurisdictions across the state. The California Department of Housing and Community Development (HCD) releases annual reports that track housing permits by RHNA category. The permit data available for this progress report update is from 2013 to 2018, while the corresponding RHNA (cycle 5) covers 2013 to 2021 (in other words, the available permit data doesn't cover every year of the cycle 5 RHNA). Yet even with a few years to go in terms of reported permits, the data show stark challenges the region and state have faced in meeting housing goals.

Most notably, the Sacramento region is not producing enough new housing to serve lower-income segments of population (i.e., nearly two-thirds into the 2013-2021 RHNA in terms of permit data, the region has only built 5% of the very low-income housing RHNA says is needed, and 7% of housing that serves the low-income cohort). And while building housing that serves lower-income families is a challenge across the full state, it seems particularly pronounced here.

The region's underproduction of attached product likely contributes to this outcome. While there is not always a one-to-one relationship (e.g., some multi-family units such as luxury condos serve a high-income market), attached housing products generally are more affordable than large-lot single-family homes.

Vibrant Places Table 1. Reported Housing Permits between 2013 and 2018 as Percentage of RHNA Cycle 5 Allocation

RHNA Income category	Sacramento Region	California
Very low	5%	9%
Low	7%	14%
Moderate	57%	32%
Above moderate	61%	81%

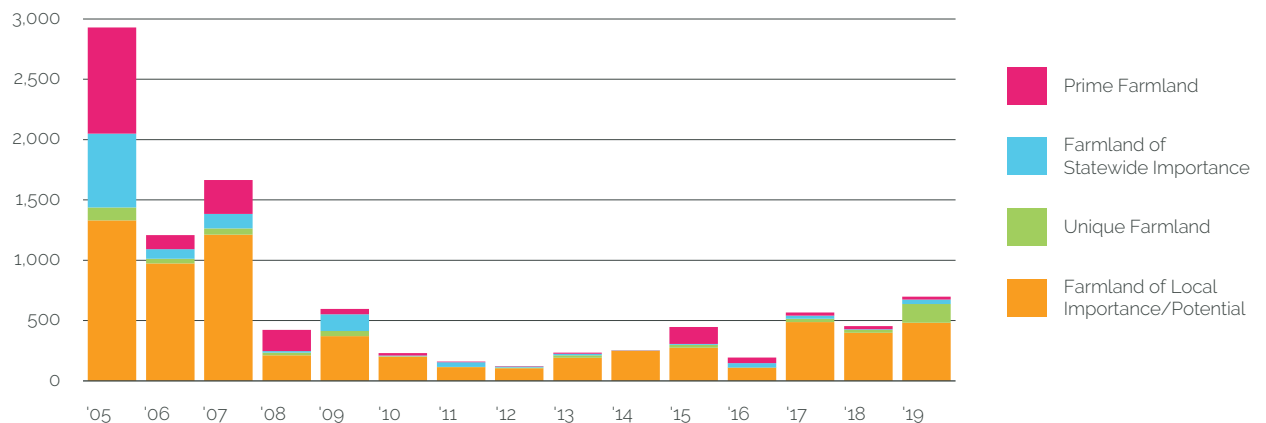
Source: SACOG analysis of HCD annual progress report permit summary. Methodology sums self-reported permits up to 2018. The table compares reported housing permits (how much housing has been built) by income category between 2013 and 2018 compared to state goals for production. Note the state goals for production in the comparison RHNA (cycle 5) go until 2021. A new cycle 6 of RHNA has been adopted which covers 2021-2029.

As large lot single-family production slows, so does consumption of agricultural land

In the housing building boom of the early 2000s the Sacramento region was losing farmland at an alarming rate: as mentioned above, the region was adding over 10,000 new large lot single family homes a year, many of which were sited on converted agricultural lands. Since the recession this trend has slowed, in particular the amount of prime farmland converted to housing. As home building has picked up the last few years, so too has the pressure on agricultural lands.

As noted above, food/agriculture is a leading tradable industry in the region, so conversion of agriculture land has an outsized impact on this key sector.

Vibrant Places Figure 4. Annual Acres of Important Farmland in Sacramento Region Urbanized by Housing: 2005 to 2019



Source: SACOG analysis of regional permits database and the CA Department of Conservation's Farmland Mapping and Monitoring Program, 2019.

The goal of “Connected Communities” means better connecting the region through a safe, well-maintained, multimodal transportation network, and an abundance of clean mobility options that provide for the efficient movement of people and goods.

Connected Communities key findings:

- Compared to other mid-sized peer areas, the Sacramento region does well on system congestion and reliability, yet state of good repair and collision indicators are going in the wrong direction. The next MTP/SCS will explore how much of the plan's investment budget should be directed towards expansion projects compared to system maintenance and modernization.
- The biggest changes in commute patterns have been a decrease in carpooling and an increase in work-from-home. The share of commuters driving to work remains almost unchanged the last 20 years.
- Transit is essential in meeting the performance outcomes of the MTP/SCS, yet like other regions, it is a challenging time for the mode: transit boardings in the region have continued to drop even as service hours have stabilized. Efforts such as Next Gen Transit and other important regional initiatives look to the future of transit in the region.
- Covid-19 has had a big near-term impact not only on the economy, but also travel. Yet the region has also been quick to rebound. It is still too soon to know if 2020 travel patterns are just a short-term blip or will lead to longer term changes in travel behavior.

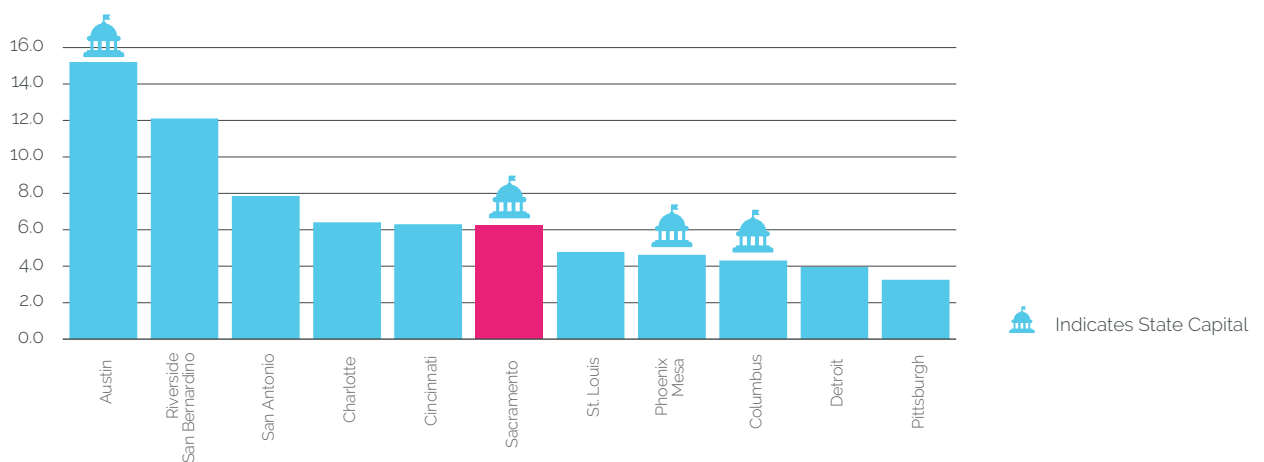
Sacramento region in middle of peers in extreme congestion

Annual person-hours of excessive delay per capita is a standard way to measure congestion across areas. The measure is calculated by summing the total number of person-hours in which people were significantly delayed due to traffic congestion (i.e., in which the traffic was traveling less than 60% of the posted speed limit), then dividing that by the population.

In our peer group, Austin, San Antonio, and the Inland Empire (i.e., Riverside and San Bernardino) stand out in terms of the significant level of freeway congestion. Freeway congestion in the Sacramento region is noticeably less compared to these three, though is a bit higher than several mid-sized Midwest peers (this measure looks only at delay on grade-separated freeways due to insufficient data on traffic volumes on non-freeway roads).

Connected Communities Figure 1. Annual Person Hours of Delay, 2019

Sacramento Urbanized Area and National Peers



Source: SACOG, December 2020. Based on National Performance Measurement Research Data Set (NPMRDS); University of Maryland Center for Advanced Transportation Technology (CATT Lab). For Sacramento Urbanized Area (UZA). Chart excludes regions that were missing PHED data on more than 10% of directional miles on qualifying roads.

Traffic fatality rate trending up since 2014, won't meet state goals

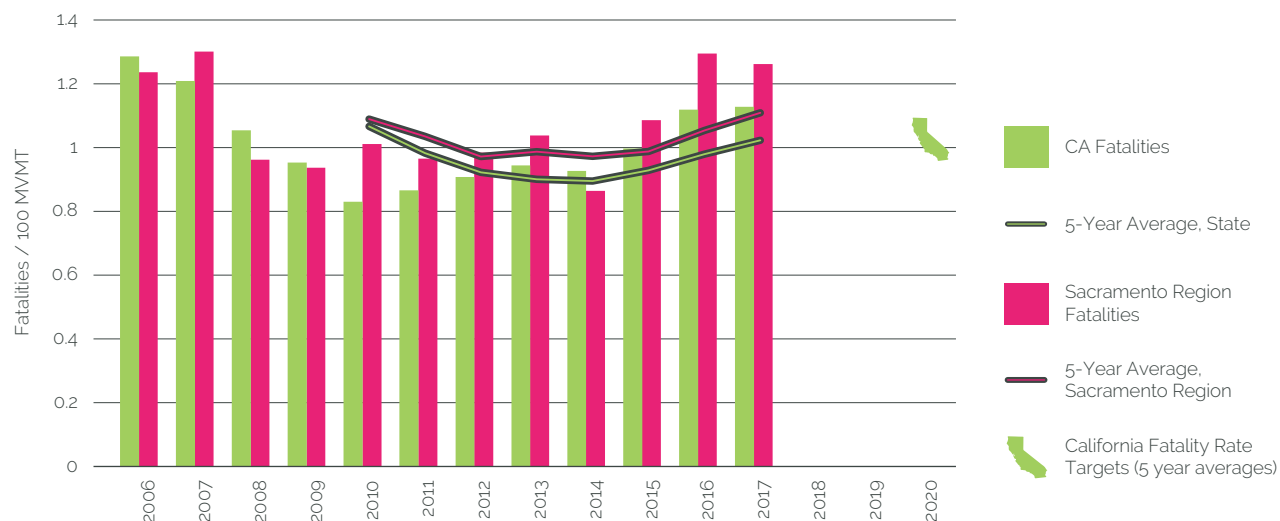
SACOG tracks the number of vehicle collisions in the region as part of the agency's performance monitoring. After a decrease during the recession (when travel was down) vehicle collisions have been increasing in the Sacramento region: in 2016 and 2017, fatal collisions surpassed pre-recession levels.

In addition to overall incidents, the Sacramento region has a growing rate of fatal collisions (on a per 100 million vehicle miles traveled basis). The region's fatality rate has been about 10% higher than the state, and this gap grew in 2016-2017.

At this rate the region won't meet its contribution to state safety performance management goals.

Connected Communities Figure 2. Traffic Fatality Rates, 2006 to 2017

Sacramento Region and California Statewide



Note: "MVMT" = Million Vehicle Miles Traveled.

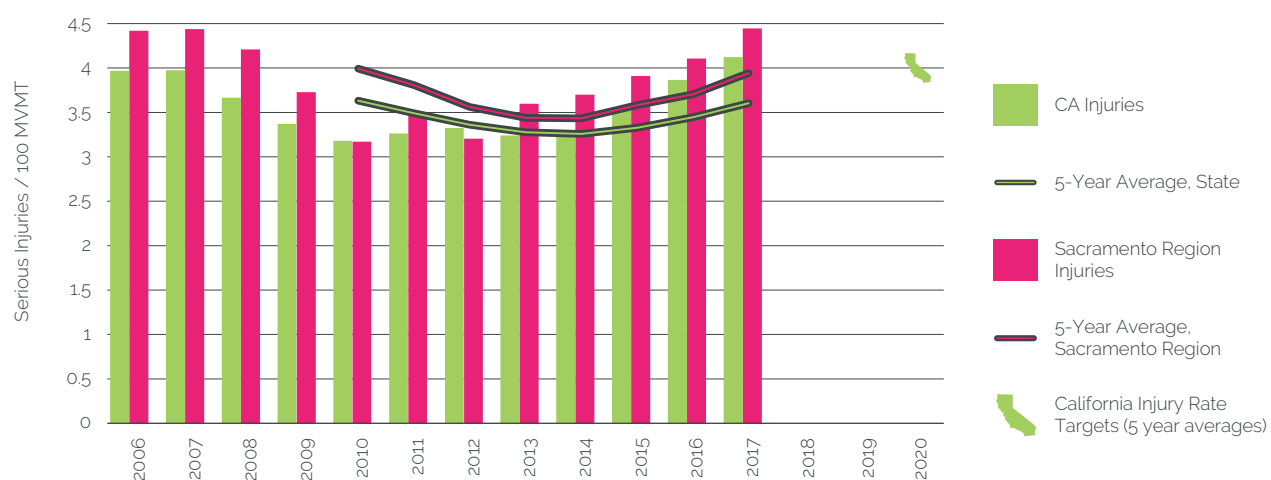
Source: SACOG, December 2020. Based on Statewide Integrated Traffic Record System. California targets for fatality rate from Samuelson, Dean, and Saurabh Jayant. "Safety Performance Management Targets for 2021." Caltrans Federal Liaison, 2020.

Similar finding for serious injuries — increasing rate, unlikely to meet state goals

The story for serious injuries resulting from a vehicle collision is the same as for fatal collisions: the Sacramento region has had an increase in both the absolute and incidence of serious injury incidents. As for the fatality rate, the Sacramento region has a higher rate of serious injury per vehicle mile traveled compared to the state.

Connected Communities Figure 3. Traffic Injury Rates, 2006 to 2017

Sacramento Region and California Statewide



Note: "MVMT" = Million Vehicle Miles Traveled.

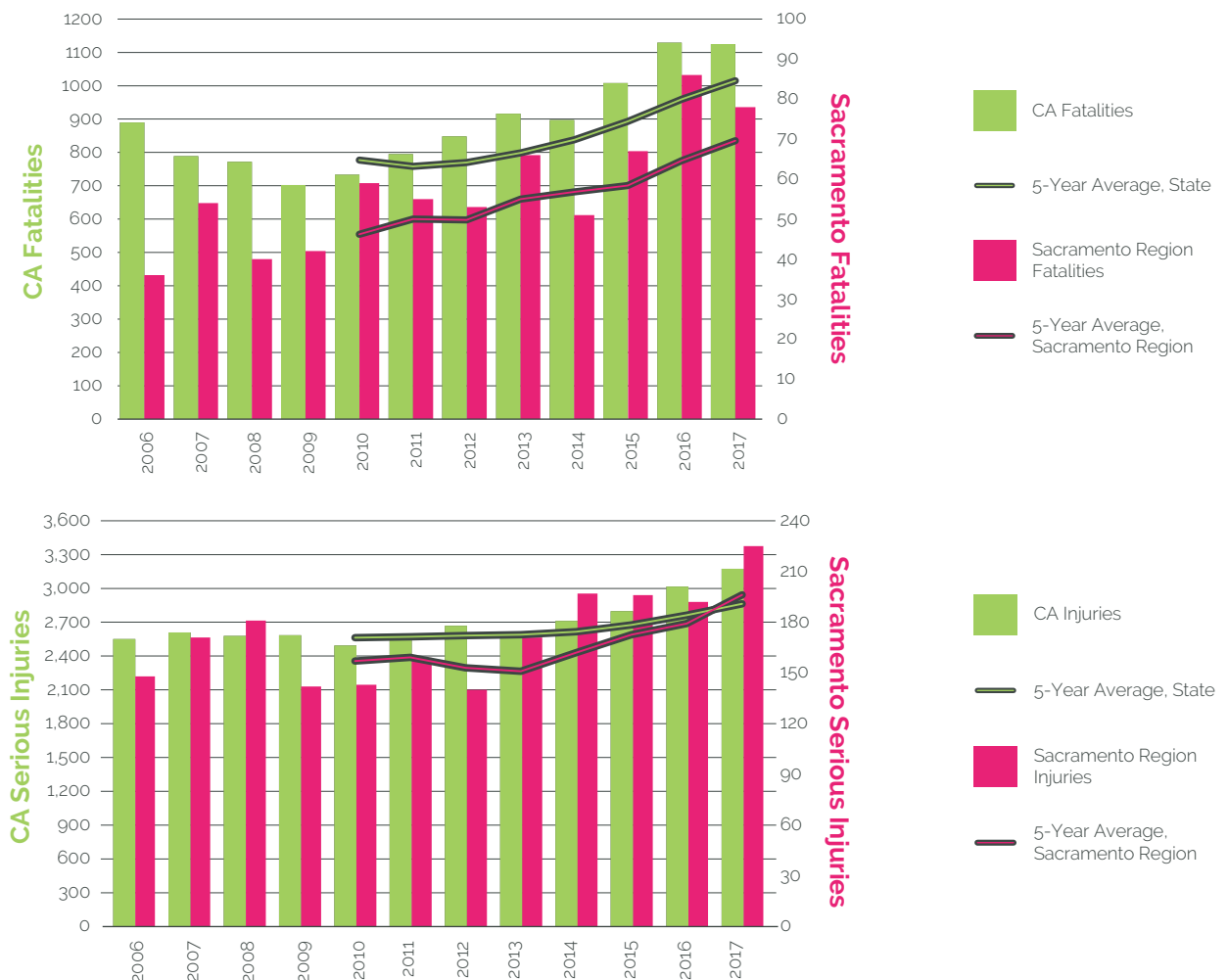
Source: SACOG, December 2020. Based on Statewide Integrated Traffic Record System. California targets for fatality rate from Samuelson, Dean, and Saurabh Jayant. "Safety Performance Management Targets for 2021." Caltrans Federal Liaison, 2020.

And fatalities and injuries for non-motorized travelers also increasing

While varying year over year, the overall trend in fatalities and injuries for non-motorized road users has been an increase through time. Unlike the rate-based measures above (e.g., collisions per 100 million VMT), this measure tracks total incidents, in that we do not have appropriate data for normalizing non-motorized fatalities/injuries (e.g. fatalities per pedestrian or bike trip, etc.)

Connected Communities Figure 4. Non-Motorized Fatalities and Injuries, 2006 to 2017

Sacramento Region and California Statewide



Note: "MVMT" = Million Vehicle Miles Traveled.

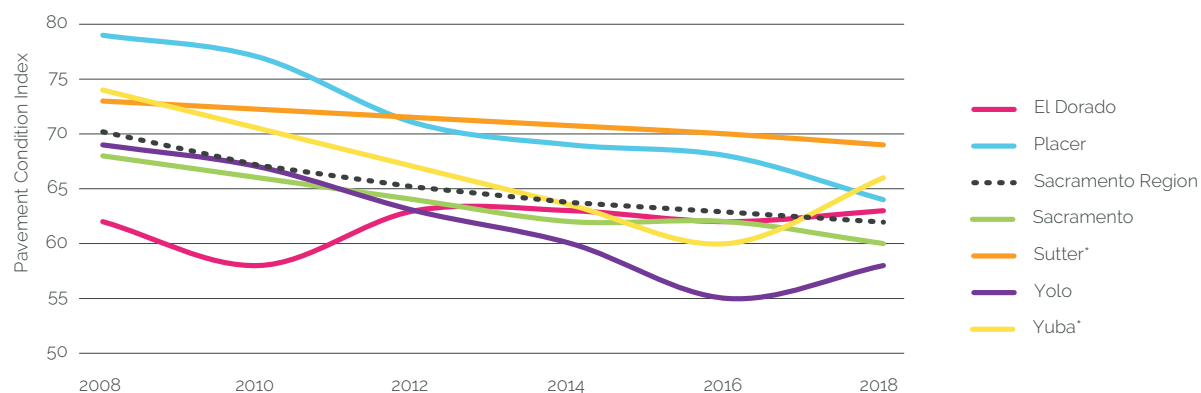
Source: SACOG, December 2020. Based on Statewide Integrated Traffic Record System. California targets for fatality rate from Samuelson, Dean, and Saurabh Jayant. "Safety Performance Management Targets for 2021." Caltrans Federal Liaison, 2020.

Region faces critical challenge in preserving existing transportation system

SACOG's MTP/SCS notes the region faces a critical challenge in preserving our existing transportation system in a time of increasing costs and decreasing revenues. During the last decade our local road conditions have declined significantly, leading to a growing backlog of maintenance projects — between 2008 and today, our roadway conditions have dropped from an average pavement condition index score of 70 to a score closer to 60 (a pavement condition index is a consistent way to monitor the condition of roads. A score of 70 or above generally means a road is in good condition, requiring routine maintenance. Scores in the 60s are signs that road conditions are deteriorating at an increasing pace, and at risk of failing).

The infusion of California's SB 1 funding will help cities and counties curtail further deterioration of our roadways, at least in the short term, but falls short of helping us climb out of the hole we've accumulated over the past decade. To bring our roads to a state of good repair in the next decade would require nearly \$900 million annually, a far cry from the \$350 to \$400 million we're spending today.

Connected Communities Figure 5. Local Street and Road Pavement Conditions, 2008 to 2018



Source: California Statewide Local Streets and Roads Needs Assessments, 2008 - 2018, accessed August 2019.

*Due to limited observed data, PCI for Sutter and Yuba counties is estimated for years 2009-2015.

The picture for transit is similar. In just the next five years, roughly half of our region's more than 500 buses are due for replacement. Nearly 60% of the light rail vehicles still in operation today are over 25 years old and in need of replacement or significant refurbishing. The cost of replacing all these vehicles likely exceeds \$400 million.

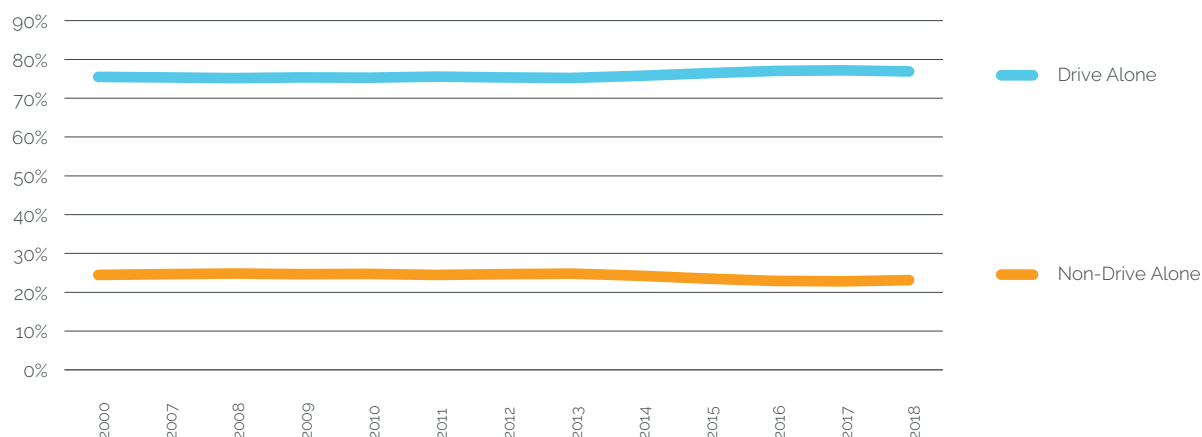
Share of commuters driving alone almost unchanged

The share of commuters opting to drive alone to work has remained largely unchanged since the year 2000. This share has increased slightly over this time period, going from about 76% to about 77%. The overall stability of this metric however masks a lot of change both in the region and how workers travel:

- The total number of workers in the region has increased by over 260,000 (31%) since 2000.
- The location of jobs for those workers has shifted. A smaller share are located in the Downtown Sacramento Central Business District (CBD), and a larger share in other jobs centers outside the CBD—Rancho Cordova, South Placer County, West Sacramento, El Dorado County, and others.
- The rates of some non-drive-alone modes have also changed dramatically (see following page for details).

Connected Communities Figure 6. Drive Alone and All Other Mode Commute Shares, 2000 to 2018

6-County Sacramento Region



Source: SACOG, December 2020. Based on American Community Survey 3-year sample data for 2007 to 2018, and the 2000 Decennial Census for year 2000.

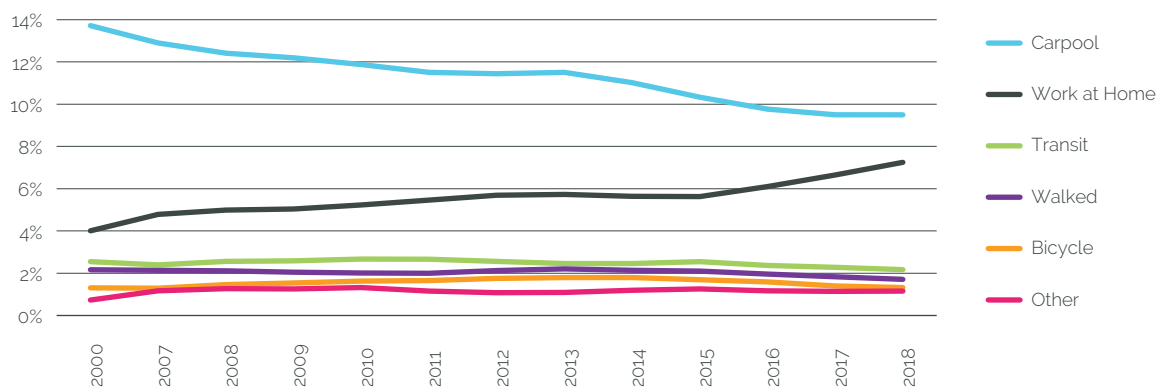
Carpooling and work-at-home show biggest changes in commuting

The relative stability in the share of commuters driving alone to work does not mean that significant changes in other modes are not happening.

- The carpool share of commuters in the region has declined, from nearly 14% in 2000 to just under 10% in 2018. Similar declines have been observed in other regions in the U.S. Good news in recent years is that decline in commuter carpooling appears to be slowing—2018 showed no decline from 2017.
- The share of workers who normally work at home has nearly doubled, from about 4% in 2000 to 7.2% in 2018, with the fastest growth between 2015 and 2018. At this increase rate, the work-at-home share would reach 10% by 2025 (and note too that this data predates any impact from Covid-19 on commuting patterns).
- The share of workers reporting bicycling, taking public transit, or walking as their main commute mode remained relatively small during the entire time series.

Connected Communities Figure 7. Alternative Modes of Commute, 2000 to 2018

6-County Sacramento Region



Source: SACOG, December 2020. Based on American Community Survey 3-year sample data for 2007 to 2018, and the 2000 Decennial Census for year 2000.

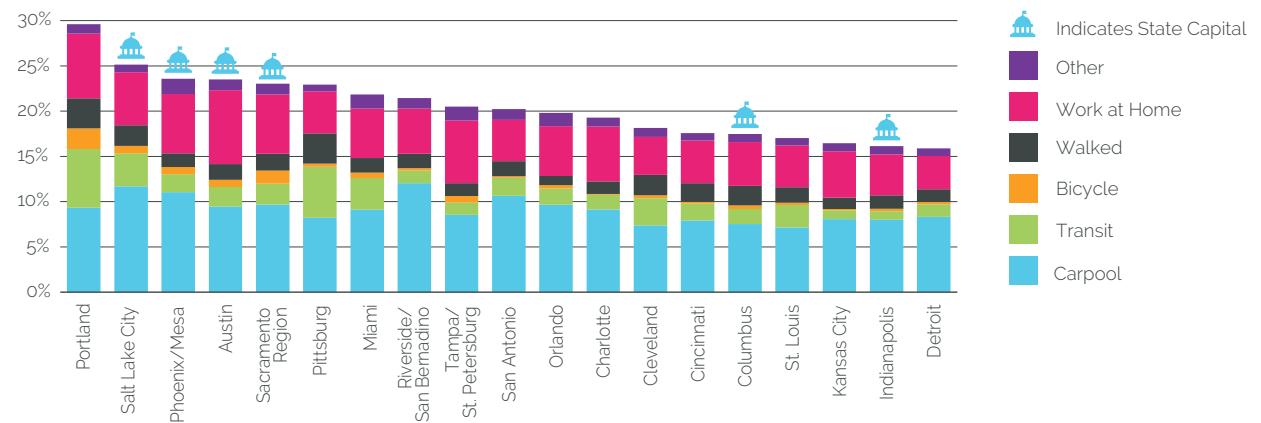
Sacramento region ranks high in commuters who do not drive alone

The Sacramento region ranks 5th among a peer group of 19 mid-sized metropolitan areas, including five other state capitals, in commuting by modes other than driving alone.

The Sacramento region ranks 2nd in share of workers commuting by bicycle—only the Portland metropolitan area is higher.

Connected Communities Figure 8. Peer Comparison of Alternative Modes of Commute, 2018

Sacramento Region and National Peers



Source: 2014-2018 5-Year American Community Survey

Higher alternative mode commuting by Black, Hispanic, and Asian workers

Using Census American Community Survey (ACS) micro-sample data, it is possible to tally commuting mode shares by the race and ethnicity of the worker surveyed. Note that these data are for 2016.

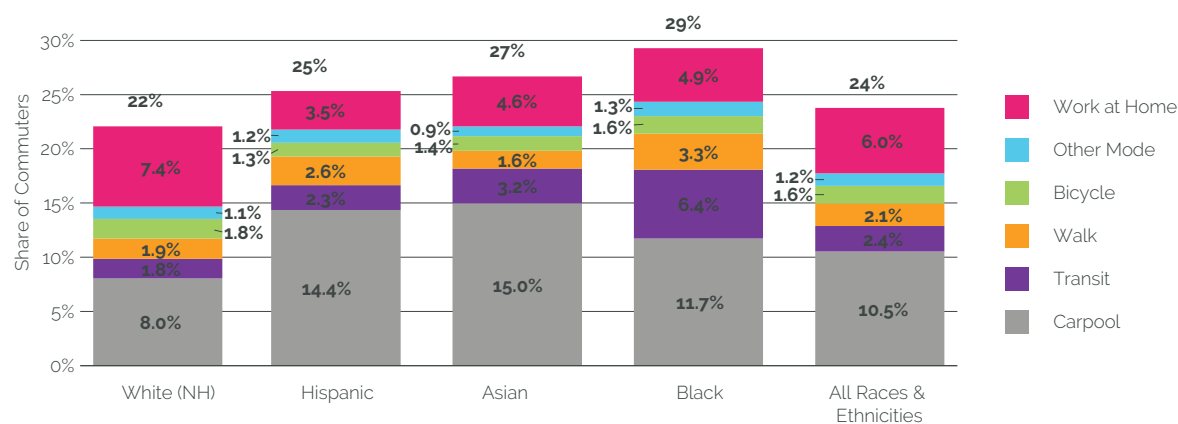
Black, Asian, and Hispanic workers all report higher rates of alternative mode commuting, compared to white workers.

- Black workers reported an overall alternative mode share of 29% (7% higher than white workers), but that overall share includes 2.5% lower work-at-home share, and 4.5% higher transit share (more than triple the share reported by white workers).
- For Hispanic workers, overall alternative mode share was 25% (3% higher than white workers), but Hispanic workers reported an even lower share of work-at-home (3.5% compared to 7.4% for white workers), and over 14% carpooling (more than 6% higher than white workers).
- Asian workers also reported nearly double the rate of carpooling than white workers (15% compared to 8%), and a lower rate of working-at-home than white workers (4.6% compared to 7.4%).

Household income is one factor that can account for some of the observed differences in commute mode, which will be looked at in greater detail on the following pages.

Connected Communities Figure 9. Alternative Modes of Commute by Race and Ethnicity, 2016

6-County Sacramento Region



Source: Census Public Use Microdata Sample, 2012-2016. Data for American Indian, Alaskan Native, Native Hawaiian, Pacific Islander, Multi-Race, or the Census' other race/ethnicity categories is not included because of the high margin of error due to smaller sample sizes. See discussion in "About the Data" chapter of this report.

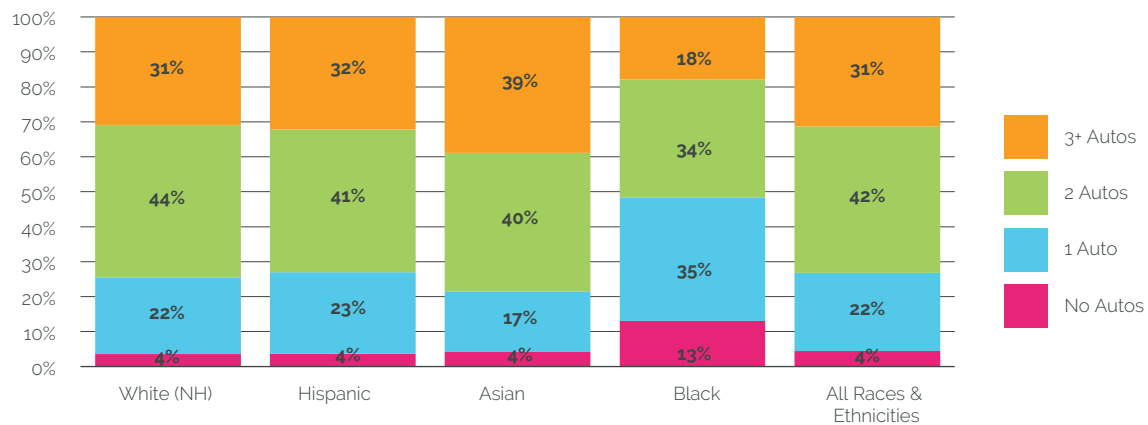
Auto ownership lower for people in Black households

Because personal vehicles handle the majority of trips in our region, ownership of automobiles is a key indicator of mobility.

- 13% of the Black population reside in households with no automobiles, more than three times the rate for white, Hispanic, or Asian populations.
- 35% of the Black population reside in households with only one automobile, nearly twice the rate for white, Hispanic, or Asian populations.

Connected Communities Figure 10. Auto Ownership by Race and Ethnicity, 2016

6-County Sacramento Region



Source: Census Public Use Microdata Sample, 2012-2016. Data for American Indian, Alaskan Native, Native Hawaiian, Pacific Islander, Multi-Race, or the Census' other race/ethnicity categories is not included because of the high margin of error due to smaller sample sizes. See discussion in "About the Data" chapter of this report.

Work-at-home lower, non-drive alone modes higher, for workers in lower-income households

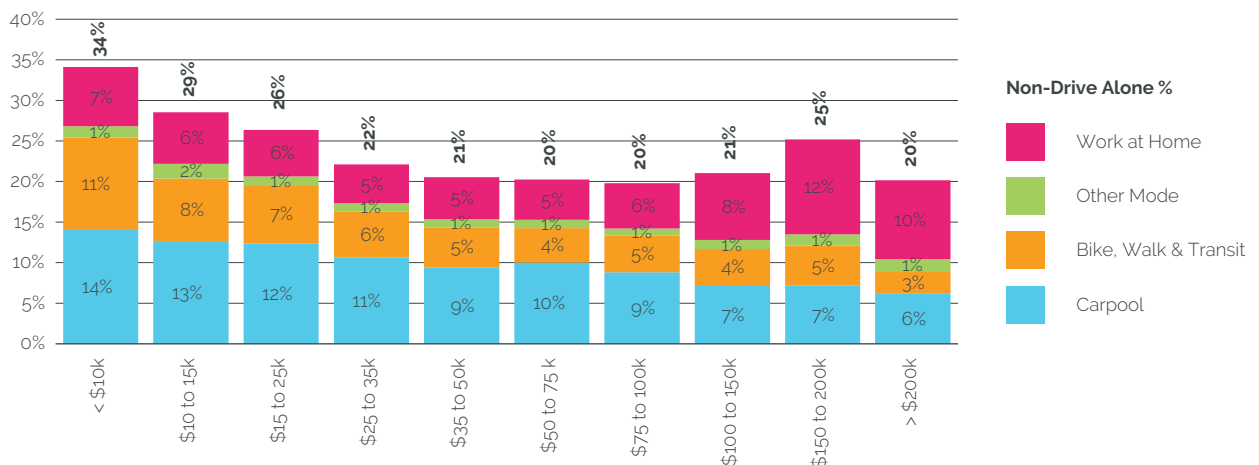
The same 2016 ACS micro-sample data also sheds insights into alternative modes of commute by level of household income.

- Workers in higher-income households reported higher rates of working-at-home than workers in lower-income households (10 to 12% for the two highest income categories, compared to 6 to 7% for the lowest).
- In contrast, workers in lower-income households reported higher rates of bike/walk/transit usage (8 to 11% for the two lowest income categories, compared to 3 to 5% for the highest).
- Workers in lower-income households also reported higher rates of carpooling (13 to 14% for the two lowest income categories, compared to 6 to 7% for the highest).

It is clear that income may be a part of the explanation of the observed difference in commute modes by race and ethnicity of the worker (see Who We Are Figure 7 for illustration of income disparity by race and ethnicity). However, other differences in occupation, location of place of work, and household structure may account for some of the difference in mode of commute by race and ethnicity.

Connected Communities Figure 11. Alternative Modes of Commute by Household Income of Worker, 2016

6-County Sacramento Region



Source: SACOG analysis Census Public Use Microdata Sample, 2012-2016

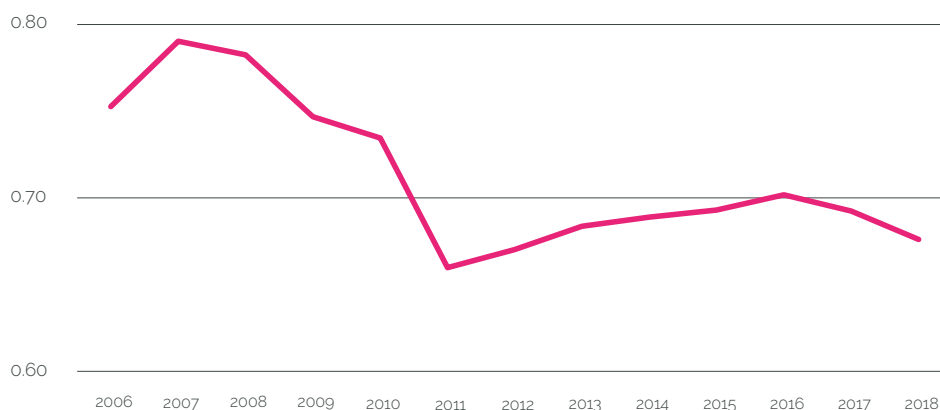
Transit service provided down from peak, but stable through 2018

An effective transit system in the region is a cornerstone of SACOG's MTP/SCS and in meeting vital air quality and economic prosperity goals for the region.

Transit service hours (the number of hours transit vehicles are providing revenue service) per capita peaked at about 0.8 annual service hours per resident. The metric fell during the recession but has now stabilized. The MTP/SCS calls for roughly 1.1 transit service hours per capita by 2040.

Connected Communities Figure 12. Transit Service Hours Per Capita, 2006 to 2018

All Operators in Sacramento Region



Source: SACOG, December 2020. Transit vehicle hours based on operator TDA Triennial Performance Audits and the National Transit Database. Transit service includes fixed route, commuter, and demand responsive. Population from California Department of Finance.

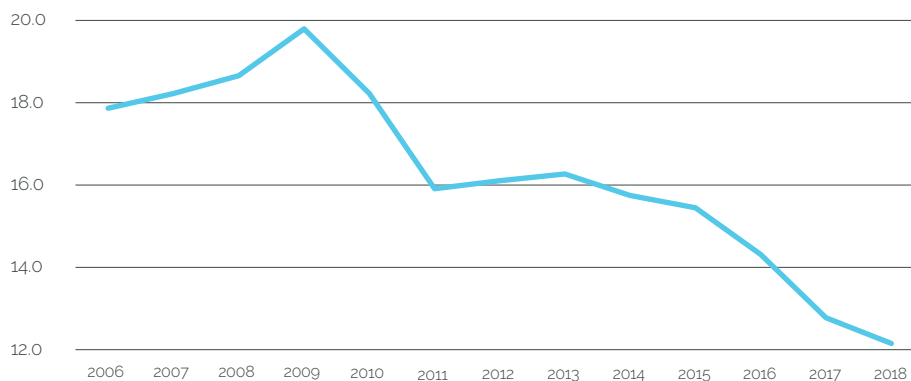
Transit ridership on steady decline since 2009

Like service hours, transit boardings per capita also peaked before the Great Recession. Boardings declined as service hours were reduced during the recession but haven't rebounded as have many other Progress Report indicators. In fact, transit boardings per resident have continued to drop even as service hours have stabilized. Note that these data only go to 2018, so the more recent changes to both service and ridership as a result of Covid-19 are not captured in these charts.

As in other regions across the country, these recent trends on transit ridership and service point to challenges in meeting the goals placed on the transit system. Efforts such as the Next Generation Transit Study seek to envision how public transit in the Sacramento region can most effectively serve current and future riders.

Connected Communities Figure 13. Transit Passenger Boardings Per Capita, 2006 to 2018

All Operators in Sacramento Region



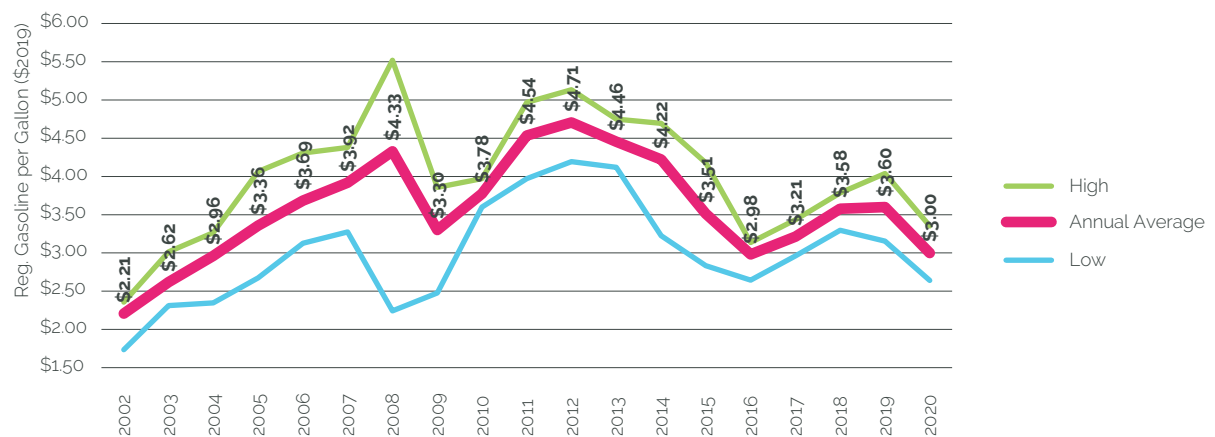
Source: SACOG, December 2020. Transit vehicle hours based on operator TDA Triennial Performance Audits and the National Transit Database. Transit service includes fixed route, commuter, and demand responsive. Population from California Department of Finance.

Gasoline prices down sharply from historic high in 2012

Gasoline prices are a key component to the cost of driving. Because driving is the dominant mode of travel in our region, the cost of fuel is very important. In particular, the cost of gasoline influences travel mode, vehicle choice, and trip frequency and length. The average price of gasoline in the state is the lowest since 2004, and well below the peak of 2012.

Connected Communities Figure 14. California Average Gasoline Price (in 2019 Dollars), 2008 to 2020

California Statewide Average



Source: SACOG, December 2020. Based on California Energy Commission weekly statewide average prices for regular gasoline.

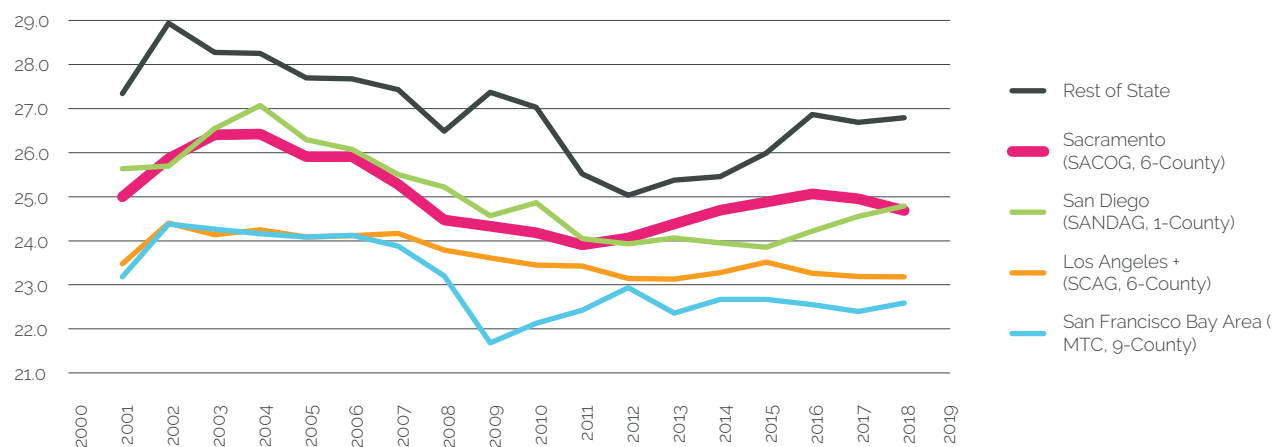
Vehicle miles traveled flat to decreasing after recovery from Great Recession

While total vehicle miles traveled (VMT) in the state is growing due to growth in population, jobs, and visitation to the state, the focus on VMT as a metric has been on the rate of VMT, rather than on the total. The most significant VMT goals set by the state for metropolitan planning organizations (such as SACOG), cities and counties focus on reduction of VMT per capita.

Daily VMT per capita declined in the state and region during the Great Recession, then rose through the recovery. Even with the uptick the last few years, all major regions in the state have lower VMT per capita today compared to the high in the early 2000s.

The larger metro areas in California continue to have lower daily VMT per capita compared to the state as a whole. Of the large metropolitan areas, Sacramento and San Diego have higher VMT/capita (about 25 miles per day in 2018) compared to Los Angeles and the San Francisco Bay Area (about 23 miles per day in 2018). While a difference of a few VMT may not seem much, it quickly adds up on a daily per capita basis and in relation to climate goals.

Connected Communities Figure 15. Daily Vehicle Miles Traveled Per Capita, 2000 to 2018



Source: SACOG, December 2020. Vehicle miles traveled based on Caltrans' "Public Road Data" reports; population estimates used for "per capita" calculations from California Department of Finance.

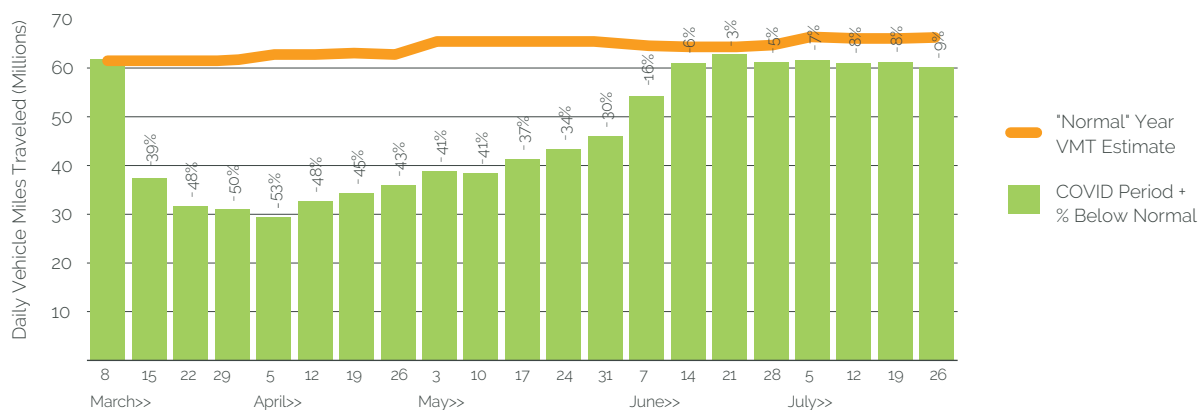
Covid-19: After initial 2020 drop, vehicle miles traveled returning to "normal" level

The impacts of Covid-19 on travel everywhere have been profound — this is true in the Sacramento region, too. The primary impacts have been generated by various public health measures (shelter-in-place orders, lay-offs of workers, closures and modification of operations of schools and businesses, etc.) as well as more voluntary changes in daily activities individuals have taken in order to minimize risks of exposure to the virus.

Early in the Covid-19 period (March through April of 2020) total VMT per day in the Sacramento region dropped significantly, to about one-half of "normal" (or what was seen in the years prior). Yet starting in late April, VMT began to steadily increase. By June, VMT had nearly returned to "normal" levels, at only 10% or less below years prior.

Connected Communities Figure 16. Vehicle Miles Traveled in Covid-19 Period

6-County Sacramento Region



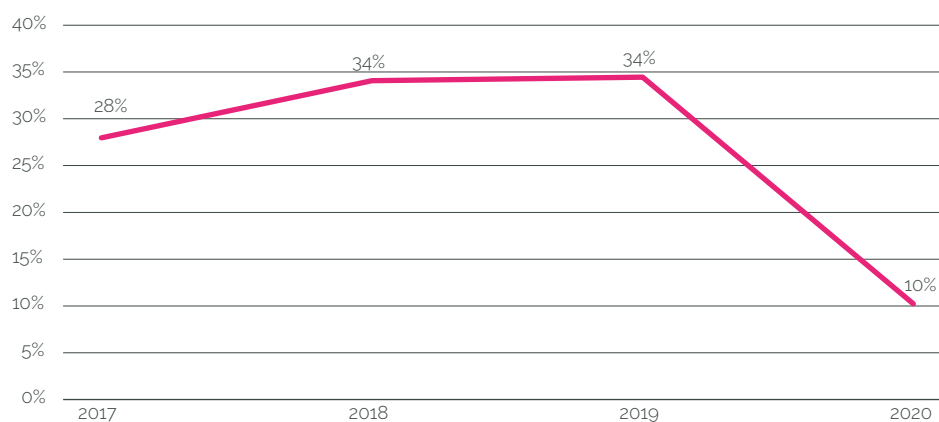
Source: SACOG, December 2020. Based on publicly available Streetlight Data, Inc. "VMT Monitor" data series, Caltrans' "Public Road Data" reports for overall level of VMT on roadways in the SACOG region, and Federal Highway Administration for seasonal adjustment factors applied to VMT.

Drop in travel caused major reduction in congestion

As shown above, Covid-19 and the associated public health responses had a dramatic near-term effect on travel, particularly commute trips, in the early part of 2020. Congestion dropped dramatically when comparing April of 2020 to the April of prior years, with the share of directional miles on major roads experiencing congestion in the region dropping by nearly two thirds.

Connected Communities Figure 17. Percent Road Miles Congested, April Averages, 2017 to 2020

Sacramento Region National Highway System Roadways



Source: SACOG, December 2020. Based on National Performance Measurement Research Data Set (NPMRDS).

National Highway System is a subset of roadways including freeways and most major surface streets.

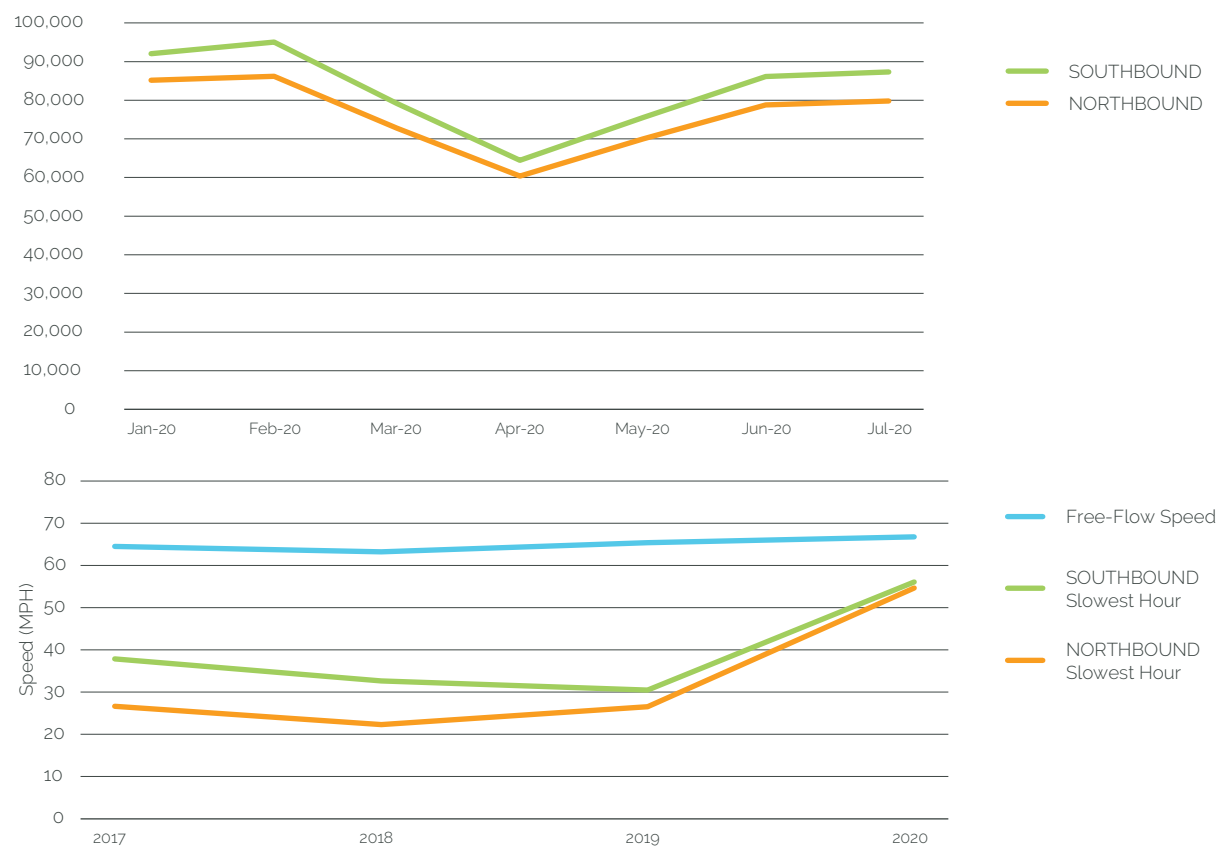
Yet as travel volumes rebound, some level of congestion returns

SACOG studied speed and traffic volumes on major locations in the region. Among these locations, traffic volumes showed a consistent “V” shape, dropping during the early weeks on the lockdown period then increasing again, in some cases to pre-Covid levels. As volumes increased, travel speeds decreased, in some cases to near pre-Covid levels.

The below charts show volumes and speeds on the northbound segment of Business 80 (Capital City Freeway) over the American River as an example of this broader trend. The traffic volumes illustrate the familiar “V” shape. Traffic speeds then are shown not just for 2020, but for prior years too. With the drop in volumes early in the Covid-19 period, traffic speeds during the worst hours of the day increased from under 30 MPH to over 50 MPH. By June, as volumes returned to nearly pre-Covid-19 levels, speeds also began to drop, to below 40 MPH.

While the broader “V” shape trend broadly describes the regional level, the magnitude and duration of the drop and rebound did vary (sometimes significantly) by studied facility. And while it is clear that Covid-19 has had a big near-term impact on travel, it is still too soon to know if 2020 travel patterns are just a short-term blip, or will lead to longer term changes in travel behavior.

Connected Communities Figure 18. Traffic Volumes and Speeds, Capital City Freeway at American River Bridge



Source: SACOG, December 2020. Based on Caltrans “Performance Monitoring System” (PeMS) data downloads and speed data from NPMRDS, processed by SACOG.

Geography

The 2021 Regional Progress Report covers the six-county Sacramento region, which consists of El Dorado, Placer, Sacramento, Sutter, Yolo, and Yuba counties. Indicators, statistics, and charts in the Progress Report titled or referenced as the "Sacramento region" or "greater Sacramento" are for this six-county area, unless otherwise explicitly mentioned in the corresponding text/chart.

Several indicators/charts however are instead at the Metropolitan Statistical Area (MSA) level. There are two different MSAs in the Sacramento region—the Sacramento MSA (also referred to as the Sacramento metro area), consisting of El Dorado, Placer, Sacramento, and Yolo counties, and the Yuba City MSA (also referred to as the Yuba-Sutter metro area), consisting of Yuba and Sutter counties. Due to data restrictions some indicators only have data for the Sacramento MSA, not the Yuba City MSA; these will be noted in the source documentation. Finally, one transportation-related indicator uses the Sacramento Urbanized Area geography, a measure of the urbanized core of the region, while the indicators drawing on SACOG's regional permit database are just for the SACOG planning region (i.e., do not include the Tahoe Basin portion of Placer and El Dorado counties). Each of these unique geographies is referenced in the source documentation.

Comparator regions

The 2021 Progress Report compares the Sacramento region to a variety of other metropolitan areas. First, the report compares greater Sacramento to fellow California regions: the Bay Area, greater Los Angeles, and San Diego are defined as the areas covered by their respective Metropolitan Planning Organizations (MTC, SCAG, and SANDAG), while the Progress Report defines the San Joaquin Valley as Fresno, Kern, Kings, Madera, Merced, San Joaquin, and Stanislaus counties.

Several indicators in the report include a comparison to other national mid-sized regions. Recent work by the Brookings Institution found these comparators share similar economic size, wealth, productivity, industrial structure, and competitiveness factors to the Sacramento region. To Brookings' list of 15 national comparators SACOG added two fellow state capitals (Austin and Salt Lake City) and another West Coast mid-sized region (Portland). In short, while regions in California are important points of comparison across many indicators (such as the population growth or housing cost measures), Brookings' work shows how benchmarking across fellow mid-sized regions instead of larger coastal areas can be an effective way to track other trends captured in the Progress Report. Comparator mid-sized regions are defined as their MSA.

Race/ethnicity data

The Progress Report draws on a wide variety of data sources. Many on race and ethnicity come from the US Census Bureau based on the respondent's self-identification within Census categories. The Census recognizes race as a social construct, noting the racial categories used "generally reflect a social definition of race recognized in this country and not an attempt to define race biologically, anthropologically, or genetically." In the Census, the concept of Hispanic origin is separate from race. In other words, the Census asks respondents if they identify as being of Hispanic, Latino, or Spanish origin, and then a separate question on how they identify within Census racial categories of Alaskan Native or American Indian; Asian; Black or African American; Native Hawaiian or Other Pacific Islander; White; Some Other Race. This two-question approach to race and ethnicity means there can be overlap between several of the reported categories in indicators that compare across groups. For example, a person who identified as being of Hispanic origin on the ethnicity question and as Black or African American on the race question would be included in both the Hispanic and Black reported categories in certain indicators. However, in other measures the data separates out Hispanic from non-Hispanic across all race categories. The Progress Report documents if the reported race/ethnicity category includes those that identify as of Hispanic origin or not, using (NH) to distinguish non-Hispanic. For example, an indicator for Black (NH) means the category covers those who selected Black or African American on the race question and 'not of Hispanic origin' on the ethnicity question. An indicator for Black (no 'NH' following in the legend) encompasses those who selected Black or African American on the race question regardless of how they answered the ethnicity question.

Because the Census is only conducted once every ten years, the bureau uses surveying techniques such as the American Community Survey (ACS) to gather important information about metropolitan regions, states, and the nation. Much of the race and ethnicity data in this Progress Report is from the ACS. The ACS source documentation details the scientific approach to these surveys, including margin of error. Data indicators on several Census racial categories in the region have high margins of error given the relatively small population and sampling size for these racial categories. As a result, outside of the total population indicator, the Progress Report does not report individual data on American Indian, Alaskan Native, Native Hawaiian, Pacific Islander, Multi-Race, or the Census' Other category. SACOG staff reviewed the available data and believe that it is not possible in the data for these categories to distinguish a true population value from a random sample error given the reported margins. However, ACS data for these racial categories can be found at <https://www.census.gov/programs-surveys/acs>

