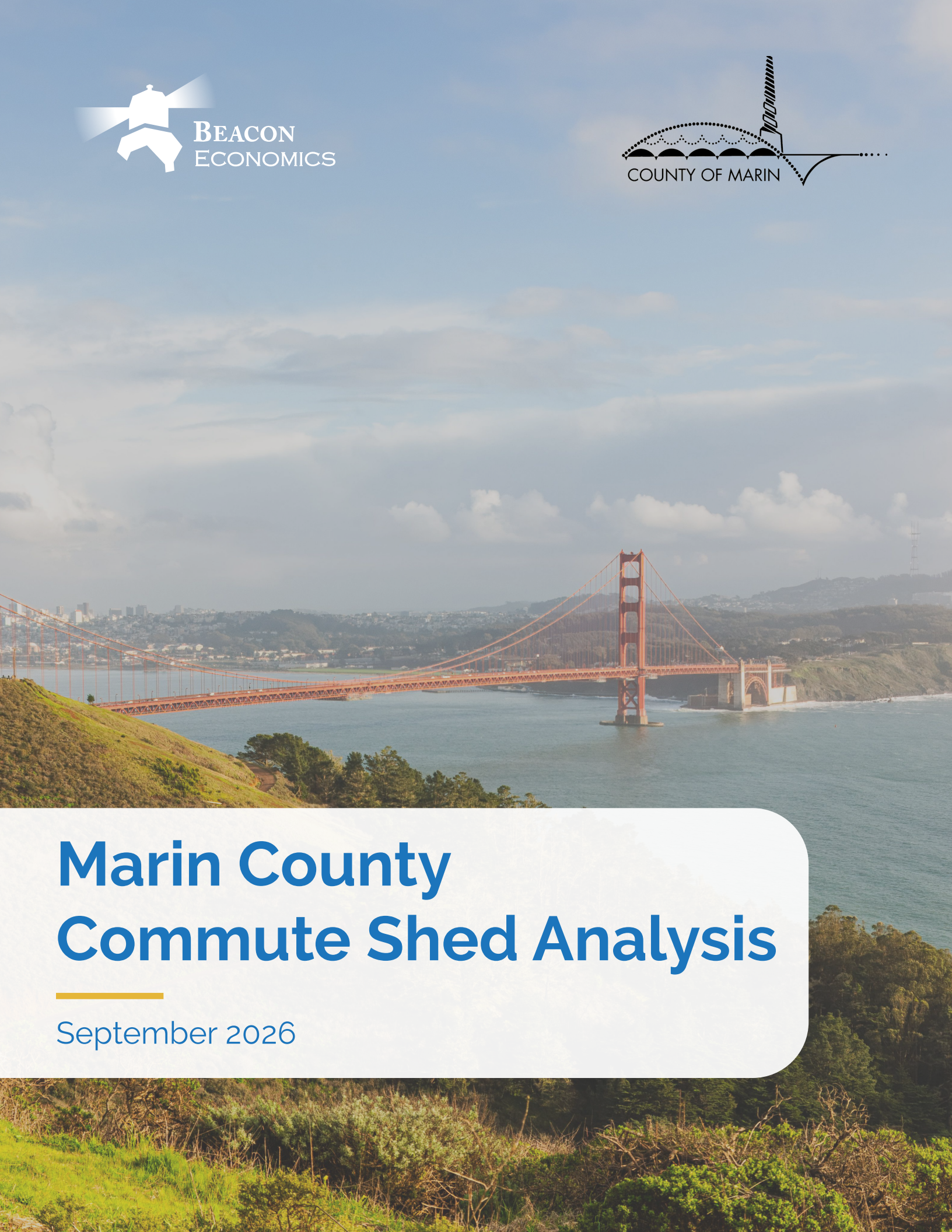


BEACON ECONOMICS

COUNTY OF MARIN

Marin County Commute Shed Analysis

September 2026

Executive Summary

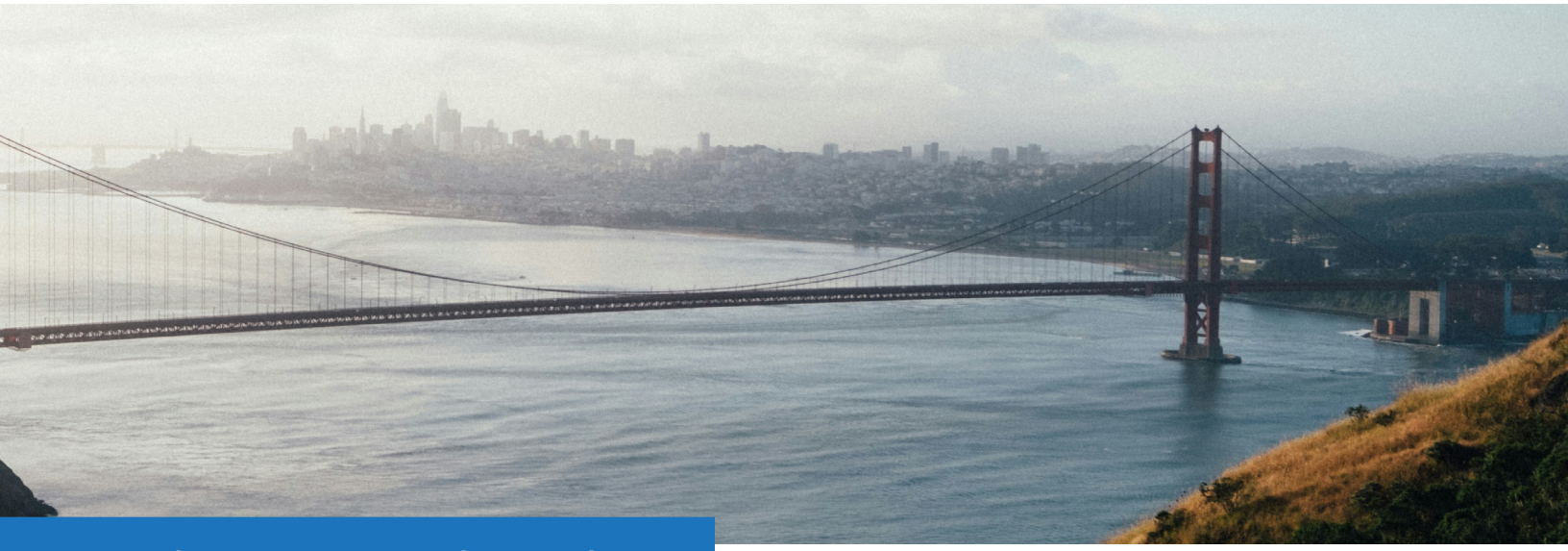


Marin County has historically been viewed as a bedroom community for San Francisco. However, recent data suggests that the county's commuting dynamics are more nuanced. While many high-earning Marin County residents do commute to places like San Francisco, the county also draws in a significant number of lower-wage workers from surrounding areas. As a result, Marin County has an overall net inflow of workers, a trend that has remained consistent over the last two decades, despite fluctuations in the Bay Area economy.

Higher-wage earners commuting out of the region while lower-wage workers commute in has important implications for regional development. It is also a symptom of the Bay Area housing shortage. The lack of housing affects economic diversity, retention, and the region's ability to meet climate goals. Despite its reputation as a bedroom community, Marin is in fact a job center that cannot adequately house its own workforce, a problem common to the Bay Area as a whole. Indeed, apartment vacancy rates in the region are among the lowest in the country, despite high asking rents and a lackluster labor market in recent years.

The current and historical lack of housing production in the region has pushed lower-wage workers into more affordable surrounding communities. Despite this, Marin County has a net inflow of workers, many of whom commute into the county from the surrounding area.

Just 36.4% of Marin's workforce lives in the county, similar to San Francisco (34.5%) and San Mateo (33.2%) counties, but well below Sonoma (67.1%) and Santa Clara (56.5%). The situation has worsened over time. In 2003, 44.3% of county jobs were held by local residents, well above the most recent figure of 36.4% in 2023. With less than half of the local workforce drawn from residents, the county relies heavily on surrounding areas for housing. This is important for development because if employers depend on workers from outside Marin, labor availability may become a constraint on business retention and growth. These constraints could have a lasting impact on city budgets and may limit the services the region can provide to its residents.



Marin County Economic Overview

Permitting activity in Marin County remains far below the level needed to increase housing supply. Demographics add another layer of complexity: an aging population and slower household turnover will lead to more modest gains in the prime working-age population.

Population

-5.2%

10-Year Change

Housholds

+1%

10-Year Change

Housing Stock

Marin County	California
+1.8%	**+7.5%**

10-Year Change

Payroll Employment

Marin County	California
-5.1%	**-6.7%**

Change since Feb-20

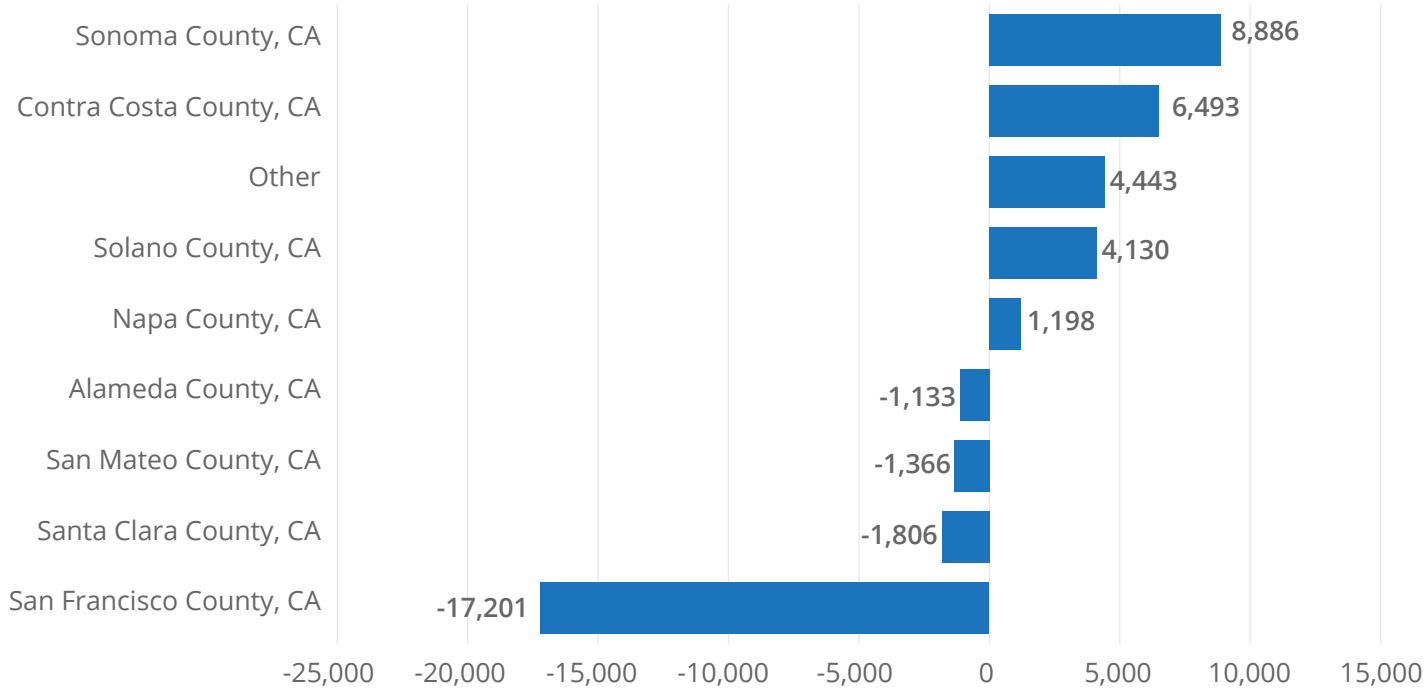
- Marin County's population has fallen by 5.2% over the last decade, trailing a 1.4% increase in California.
- Despite overall population declines, the number of households has grown by 1%, reaching an all-time high. This is being driven by rising incomes, which have allowed household size to fall by 5.9% over this period, a trend seen across California.
- Marin County has increased its housing stock by just 1.8% over the last decade, which limits how quickly other parts of the county's economy can grow. This growth is well below growth in California (7.5%) over the same period.
- Since February 2020, payroll employment in Marin County has fallen by 5.1%, compared with employment growth in California (2.8%), Solano (2.2%), San Jose (0.8%), and Napa (0.5%), and a -6.7% decline in San Francisco (MD).
- The labor force in Marin County fell by 6.7% from February 2020 to May 2026. Among Bay Area counties, only San Francisco (MD) saw a larger decline, falling by 7.6%. By comparison, the labor force grew by 0.2% in California and 0.6% in Solano County.

Marin County Commuting Patterns

Housing also helps explain the commuting dynamics of Marin County. High-wage earners employed in areas like San Francisco are able to afford the high housing costs of the region, while lower-wage workers are forced to commute into the region from lower-cost areas.

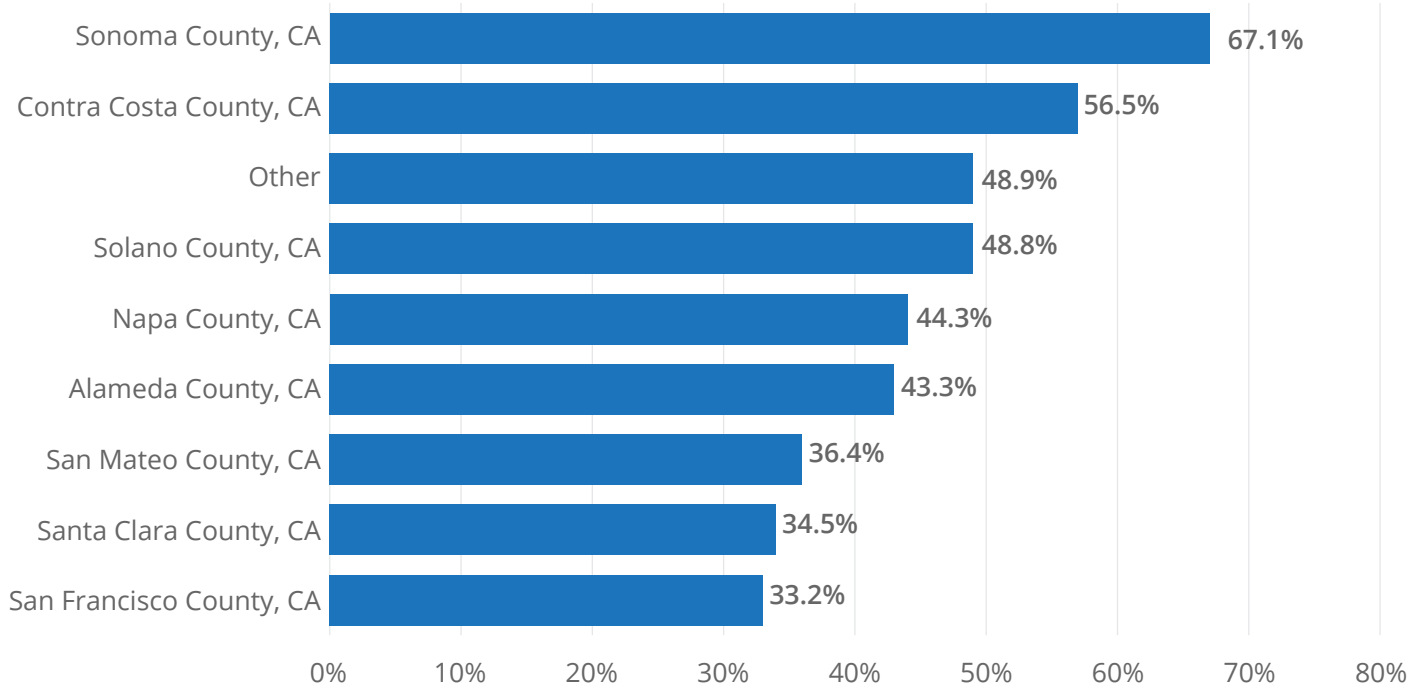
- In 2023, Marin County saw a net inflow of 3,644 workers. Although a modest decline from pre-pandemic levels, this marks an increase from recent years. Overall, the county has experienced a steady net inflow of residents over the past two decades.
- Marin County sees a net inflow of workers from Sonoma, Contra Costa, Solano, and Napa counties. These communities offer more affordable housing than Marin, and serve as an important source of housing for Marin County workers.
- Marin County sees a net outflow of workers to San Francisco, Santa Clara, San Mateo, and Alameda counties. These areas are home to the Bay Area's major tech giants, which offer higher wages compared to jobs in Marin County.
- In 2023, the number of Marin County residents who commute totaled 40,303, a 2.3% decline from 2013. Still, county residents make up just 36.4% of the local workforce, a steep decline from the 2003 figure of 44.3%.

2023 Marin County Net Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.

County Residents Share of County Employment



Source: U.S. Census Bureau. Analysis by Beacon Economics.

Marin County Commuting by Subregion

While overall net inbound commuting to Marin County is positive, commuting patterns vary across county subregions.

- The Central Marin region saw a net inflow of 388 workers from outside the county.
- The Novato region saw a net inflow of 216 workers from outside Marin County.
- The San Rafael region saw a net inflow of 6,801 workers from outside Marin County.
- The Southern Marin region saw a net outflow of 3,755 workers to counties outside Marin County.
- The West Marin region saw a net outflow of 19 workers to counties outside Marin County.

These patterns show that the areas closest to San Francisco see a net outflow of workers, while those in other parts of the county see a net inflow.



Marin County Commuter Profile

The demographic of commuters shows which types of jobs need to be filled by workers outside Marin County, and which types of jobs county residents are commuting longer distances for.

- In 2024, net inbound commuting was highest for occupations in community/social services, healthcare support, and production. These occupations often do not pay wages sufficient to afford housing in the region. As a result, workers commute in from lower-cost counties.

- Net outbound commuting is highest for management, legal, and business/financial positions. These are higher-paying occupations, with wages in nearby San Francisco ranking among the highest in the nation.

- Marin County sees a net inflow of workers age 44 and under. In contrast, the county has a net outflow of workers age 45 and over. Younger workers have not yet entered their highest earnings years and, because of the high cost of housing in the region, have had to look for more affordable housing in nearby counties. In addition, older workers were able to enter the housing market when it was more affordable.

- Marin County sees a net inflow of workers earning under $100,000 and a net outflow of workers earning $100,000 and over. On net, higher-paid workers tend to commute to jobs outside the county, while lower-wage workers tend to commute into the county.

- In 2024, an estimated 32,424 workers said they worked from home, a more than 160% increase from 2014. This increase in work from home corresponded with a significant decline in commuting by private motor vehicle for Marin County residents, which fell by 22.5% over the same ten-year period.

Introduction

Understanding commuting patterns in Marin County helps governments, businesses, planners, and researchers make better decisions about transportation, economic development, housing, and public services.



Transportation Planning:
Commuting data helps identify congested routes and areas that need improved roads or public transit.



Economic Development:
Understanding where workers come from and where jobs are located helps local officials attract businesses and identify workforce shortages.



Housing and Land-Use:
A significant number of outbound or inbound commuters may indicate a mismatch between affordable housing and employment centers, informing future housing policies and helping address potential shortfalls.



Environmental Justice:
Commuting patterns influence congestion, fuel consumption, and greenhouse gas emissions, which impact the air quality and health of county residents.

The report draws on several data sources to analyze the commuting dynamics of Marin County residents. These include:

- Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics from the U.S. Census Bureau.
- The American Community Survey (ACS) from the U.S. Census Bureau.
- Commuting by occupation data from Lightcast.

The LEHD from the U.S. Census Bureau provides detailed information on where people work and where they live, making it a valuable resource for analyzing commuting dynamics. The LEHD can be used to determine how many workers live in the county and work elsewhere (outbound commuters), to measure how many workers live outside the county but commute into it (inbound commuters), and to calculate the number of people who both live and work in the county. The data from LEHD is also available at the census block level, providing insights into commuting dynamics that are often not available at the sub-county level. This helps identify which subregions have more outbound commuters or inbound commuters. The LEHD is also available for multiple years, which highlights changes in commuting patterns over time. A downside of the LEHD is its lagged time frame. Because the survey combines several complex datasets, the data lags other data releases, with 2023 being the most recent year available.

The U.S. Census Bureau's ACS also provides detailed demographic information on workers and where they live and work. The Public Use Microdata Sample (PUMS) files from the ACS provide detailed demographic and socioeconomic characteristics of commuting populations at a level not available through either LEHD or Lightcast. PUMS allow a description of commuters by variables such as educational attainment, earnings distribution, age, mode of transportation, and commute time. This is valuable for constructing demographic profiles that cut across multiple characteristics simultaneously.

To complement the geographic and industry detail available through LEHD, the report incorporates Lightcast's occupation-level commute data. This adds dimension to the analysis by revealing which specific occupations are driving commute flows, information not available through LEHD alone. Layering in occupation-level detail provides a better understanding of which jobs are drawing workers into the county and which jobs residents are leaving the county to fill. This will provide a more granular picture of labor market dynamics and help identify occupational mismatches or dependencies tied to commuting behavior.

Combining these data sets enables us to identify where Marin County residents are commuting for work, where Marin County is drawing in workers from, and who lives and works in Marin County. The data will also allow us to identify the demographics of these workers.



Marin County Economic Overview

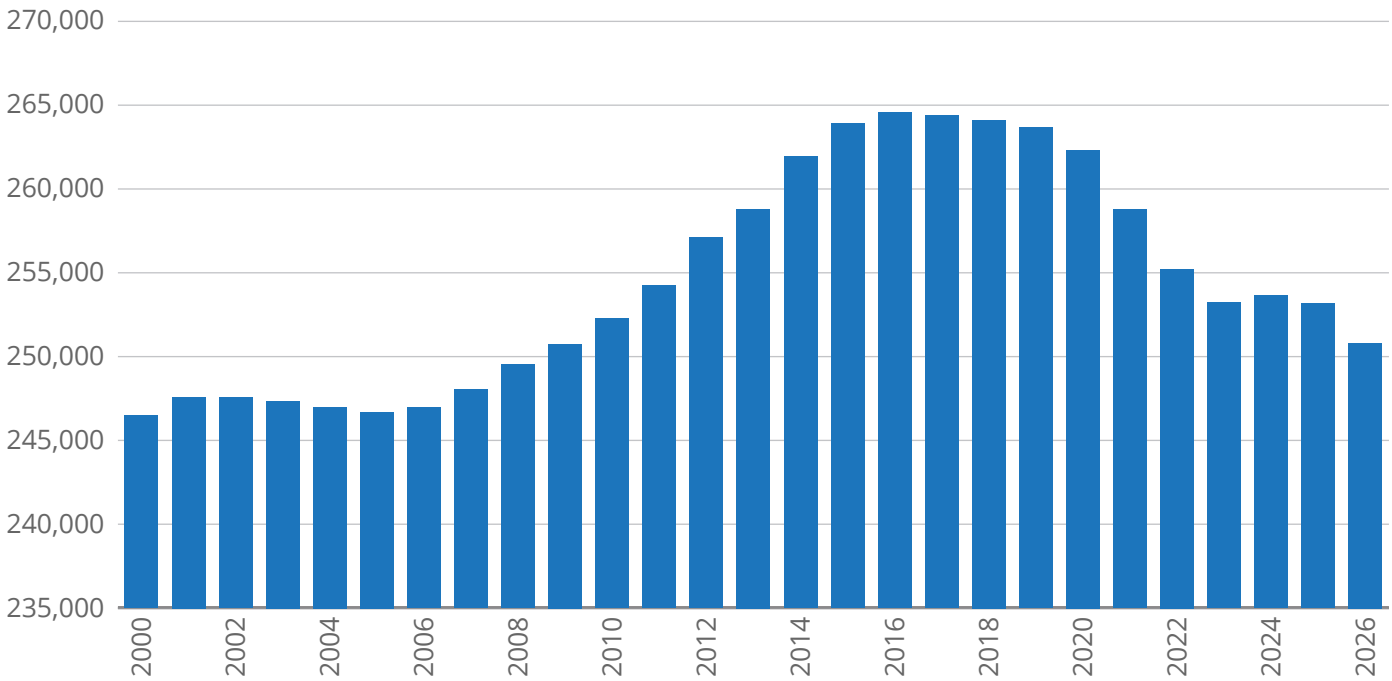
The central challenge for Marin County remains housing. Even with modest population losses over the last decade, the number of households is at an all-time high, which limits how fast the county can grow. Permitting activity remains far below the level needed to reverse that trend. Recent CEQA streamlining is a welcome course correction and will help a subset of infill projects. But on its own, it is unlikely to have much effect on housing supply or affordability across the county. Demographics add another layer of complexity: an aging population, slower household turnover, and more modest gains in the prime working-age population.

- **Marin County's population has fallen by 5.2% over the last decade**. Declines have been largest in the unincorporated areas of Marin County (-9.3%). Corte Madera was the only part of the county to see its population expand over this period. The population declines in Marin County contrasted with a 1.4% growth in California over the same period.

- Despite the overall population decline, **rising incomes are allowing households to spread out**. Household size has fallen by 5.7% over the last decade, while the number of households has grown by 1%. Although already in place, these trends accelerated after the pandemic.

- Marin County housing stock increased by just 1.8% over the last decade, well below statewide growth of 7.5%. **A lack of housing production limits how quickly other parts of Marin County's economy can grow**.

Marin County Population



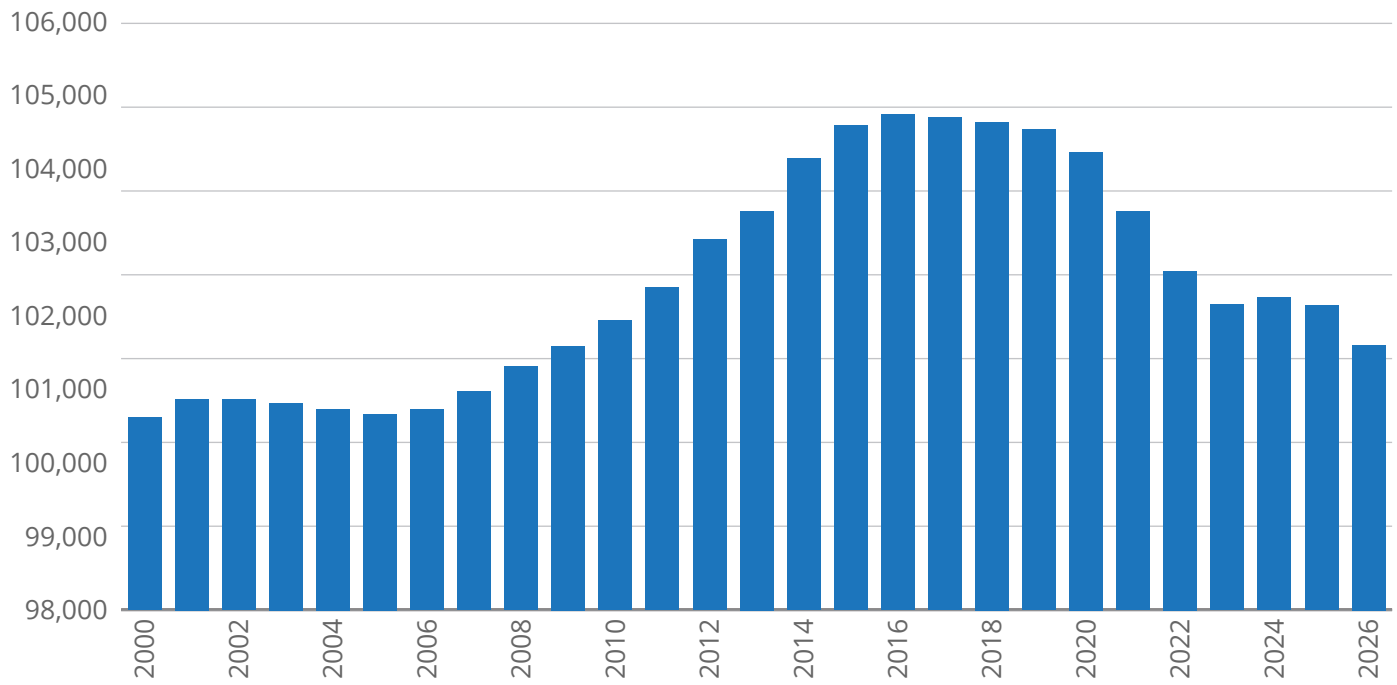
Source: California Department of Finance. Analysis by Beacon Economics.

Marin County Population

Location	2026 Population	10-Year Chg. (#)	10-Year Chg. (%)
County Total	250,823	-13,731	-5.2
Unincorporated	63,052	-6,486	-9.3
San Rafael	59,890	-1,690	-2.7
Novato	51,638	-2,486	-4.6
Mill Valley	13,694	-799	-5.5
Larkspur	12,650	-357	-2.7
San Anselmo	12,474	-479	-3.7
Corte Madera	9,910	86	0.9
Tiburon	8,841	-504	-5.4
Fairfax	7,414	-354	-4.6
Sausalito	6,878	-437	-6.0
Ross	2,324	-116	-4.8
Belvedere	2,058	-109	-5.0

Source: California Department of Finance. Analysis by Beacon Economics.

Marin County Households



Source: California Department of Finance. Analysis by Beacon Economics.

Marin County Households

Location	2026 Households	10-Year Chg. (#)	10-Year Chg. (%)
County Total	104,744	1,015	1.0
Unincorporated	25,593	-646	-2.5
San Rafael	23,755	679	2.9
Novato	20,873	419	2.0
Larkspur	6,171	129	2.1
Mill Valley	6,070	15	0.2
San Anselmo	5,335	104	2.0
Corte Madera	4,053	248	6.5
Sausalito	4,037	-15	-0.4
Tiburon	3,762	32	0.9
Fairfax	3,355	22	0.7
Belvedere	909	-3	-0.3
Ross	831	31	3.9

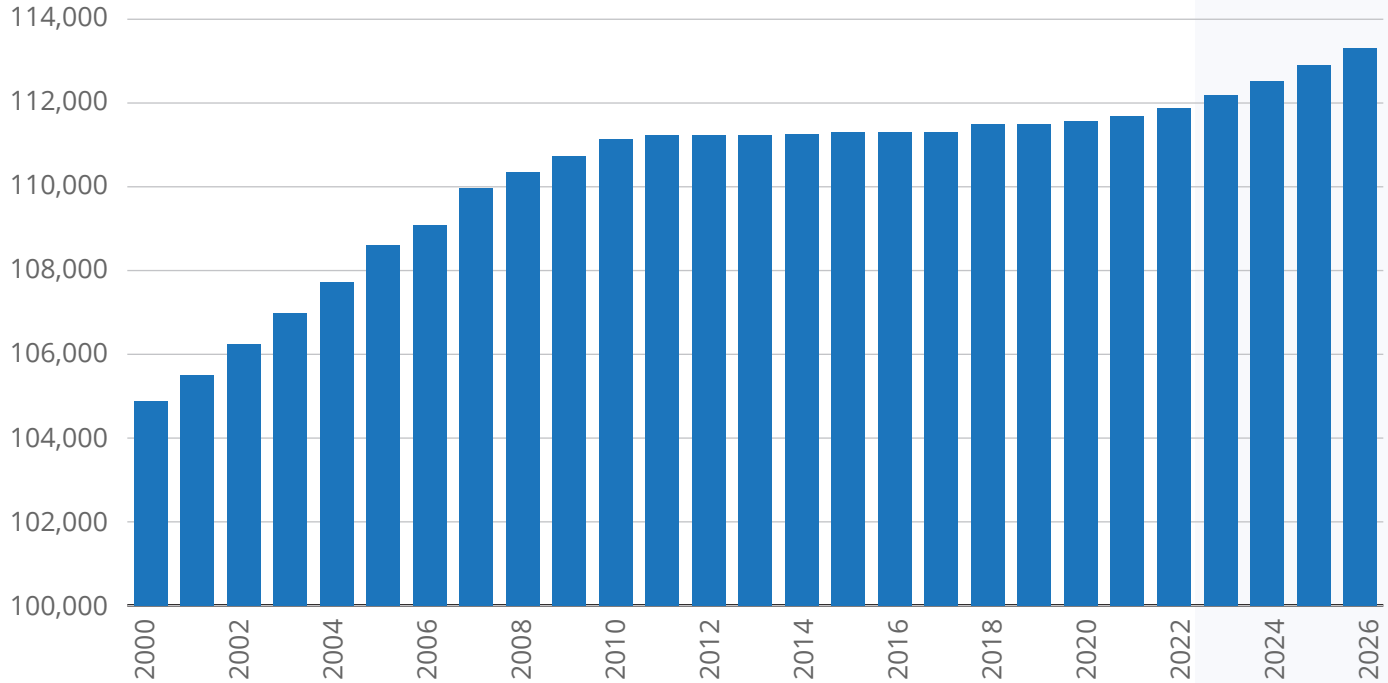
Source: California Department of Finance. Analysis by Beacon Economics.

Marin County Household Size



Source: California Department of Finance. Analysis by Beacon Economics.

Marin County Housing Stock



Source: California Department of Finance. Analysis by Beacon Economics.

Marin County Housing Stock

Location	2026 Housing Stock	10-Year Chg. (#)	10-Year Chg. (%)
County Total	113,305	2,005	1.8
Unincorporated	29,647	307	1.0
San Rafael	24,940	685	2.8
Novato	21,615	345	1.6
Mill Valley	6,591	65	1.0
Larkspur	6,533	78	1.2
San Anselmo	5,633	114	2.1
Sausalito	4,474	-6	-0.1
Corte Madera	4,240	249	6.2
Tiburon	4,099	70	1.7
Fairfax	3,544	42	1.2
Belvedere	1,074	20	1.9
Ross	915	36	4.1

Source: California Department of Finance. Analysis by Beacon Economics.

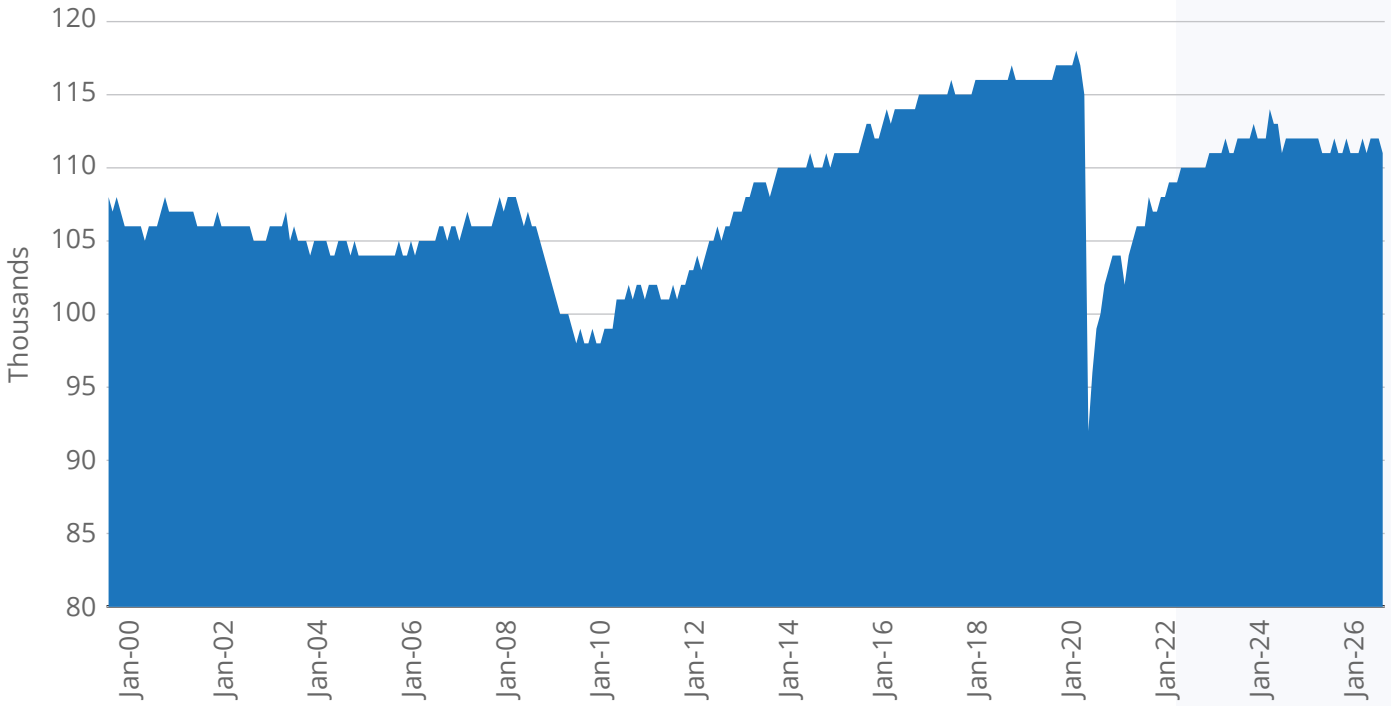
Marin's County's labor market has been slow to recover from the pandemic. With more companies shifting to work-from-home or hybrid schedules, workers have been able to relocate to more affordable parts of the country or state. This dynamic can be seen in the region's falling population, as mentioned earlier.

- **Payroll employment growth throughout the Bay Area has trailed the state in recent years**. Since February 2020, payroll employment in Marin County has fallen by 5.1%. This is in stark contrast to the growth in California (2.8%), Solano (2.2%), San Jose (0.8%), and Napa (0.5%) over this period. In addition, only San Francisco (MD) (-6.7%) has lost a higher share of jobs in the Bay Area over this period.

- **Household employment in Marin County has fallen by 8.3% from February 2020 to May 2026**. California also saw a modest decline of 0.7% over this period. San Francisco (MD) (-9.1%) was the only Bay Area region that had a steeper decline than Marin County over this period.

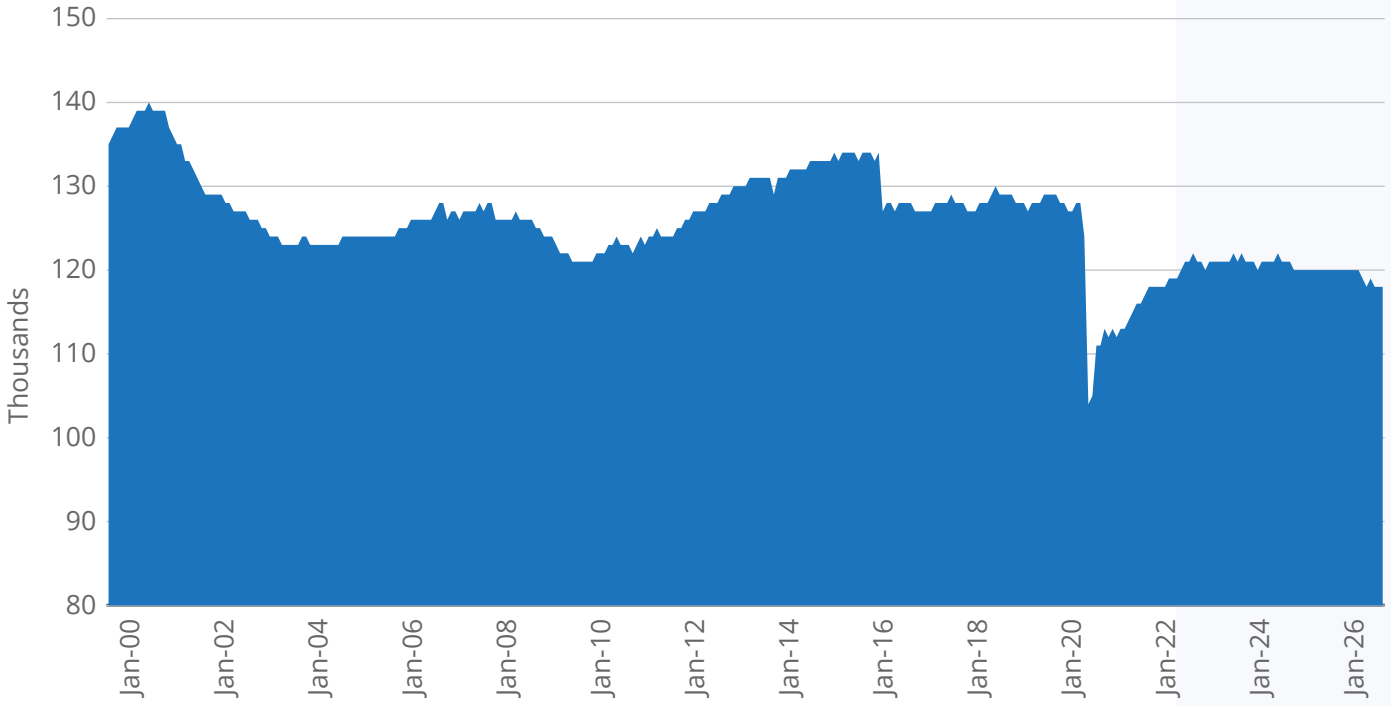
- Since the start of the pandemic, **Marin County's labor force has fallen by 6.7%**, trailing growth in California (0.2%) and Solano (0.6%). In the Bay Area, only San Francisco (MD) (-7.6%) experienced a steeper decline over this period.

Marin County Total Nonfarm Employment



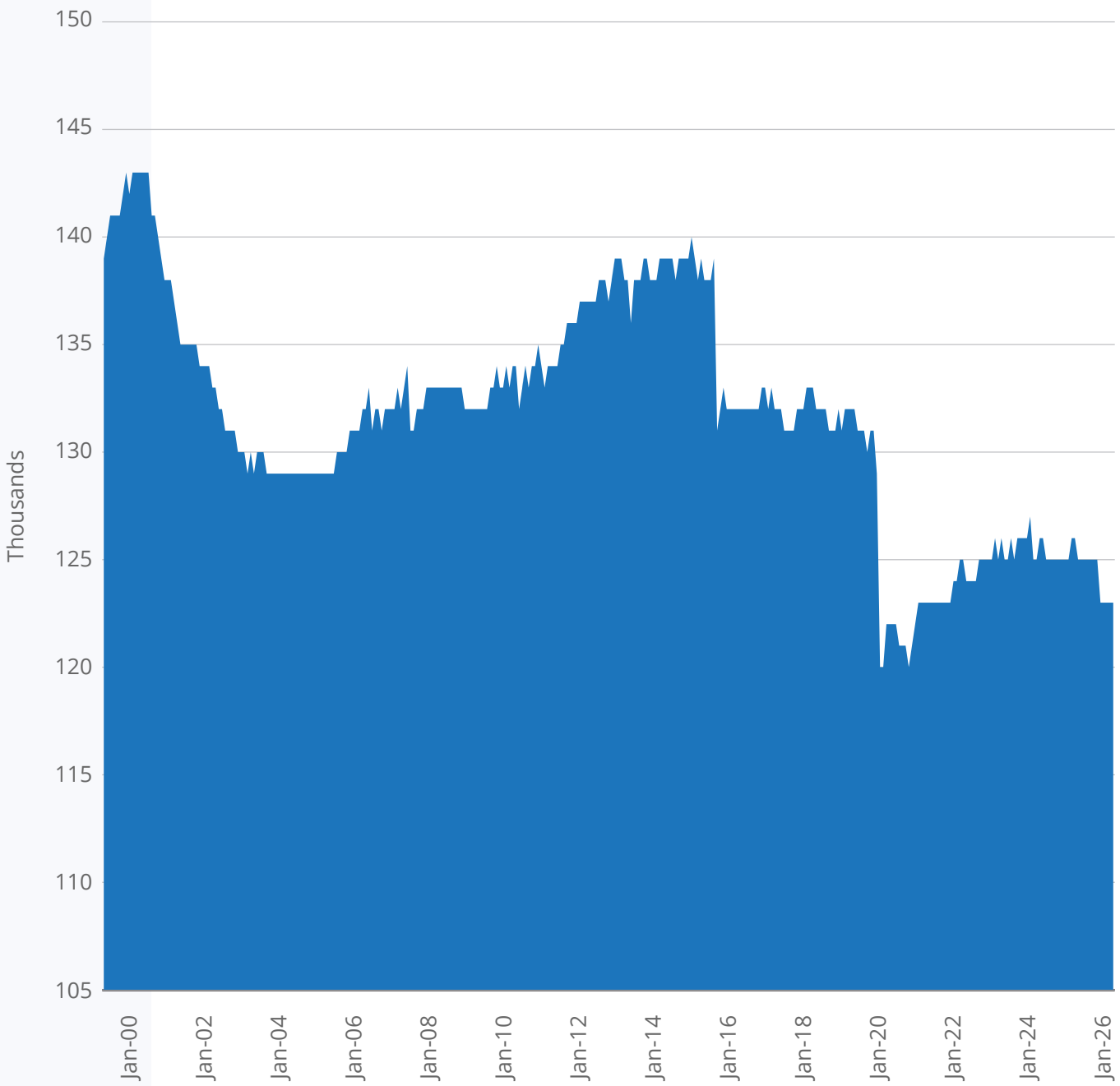
Source: California Employment Development Department. Analysis by Beacon Economics.

Marin County Household Employment



Source: California Employment Development Department. Analysis by Beacon Economics.

Marin County Labor Force



Source: California Employment Development Department. Analysis by Beacon Economics.



Marin County Commuter Trends

Housing constraints in Marin County play a central role in its commuting dynamics. The county sees a significant number of high-earning workers commute to areas like San Francisco each day. These workers can afford the county's high-cost housing. At the same time, Marin draws in a significant number of lower-wage workers from surrounding areas. Overall, the county sees a net inflow of workers. This trend has been consistent over the last two decades, despite the ups and downs of the Bay Area economy.

While overall net inbound commuting to Marin County is positive, commuting patterns vary. Southern Marin and West Marin, which are closest to San Francisco, have a net outflow of workers each day, while Central Marin, Novato, and San Rafael have a net inflow.

The following section details where Marin County is drawing in workers from, where Marin County workers are commuting to, and the number of residents in Marin County who work locally. This analysis uses the U.S. Census Bureau LEHD.

In 2023, Marin County saw a net inflow of 3,644 workers. This represents a modest decline from pre-pandemic levels, but an increase from recent years. Still, the county has had a consistent net inflow of workers over the last two decades.

- Marin County sees a net inflow of workers from Sonoma, Contra Costa, Solano, and Napa counties.

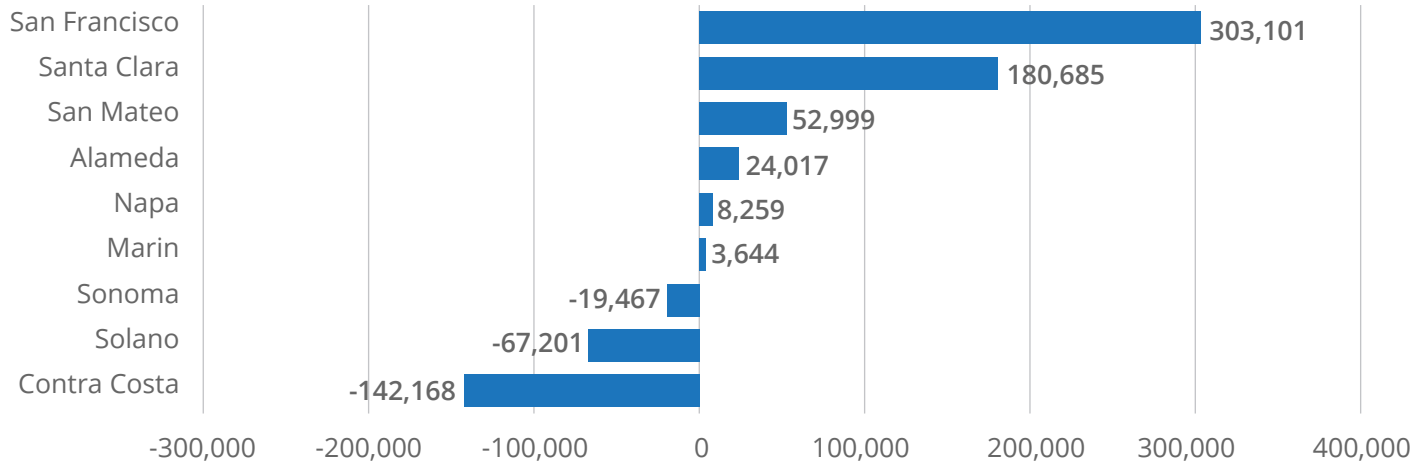
- Marin County sees a net outflow of workers to San Francisco, Santa Clara, San Mateo, and Alameda counties.

In 2023, the number of outbound commuters from Marin County totaled 66,757 workers, a 7.8% increase over the last decade. The most popular destinations for outbound commuters were San Francisco, Alameda, Sonoma, San Mateo, and Santa Clara counties. Outbound commuting to Santa Clara, San Mateo, Napa, and Alameda counties has risen significantly over the last decade, while it has fallen for Solano and San Francisco counties.

In 2023, 70,401 workers commuted into Marin County, a 4.9% increase over the last ten years. The most common home counties for inbound commuters were Sonoma, Contra Costa, San Francisco, Alameda, and Solano. Inbound commuting from Solano and Alameda counties increased significantly over the last decade, while it declined from San Francisco and Santa Clara counties.

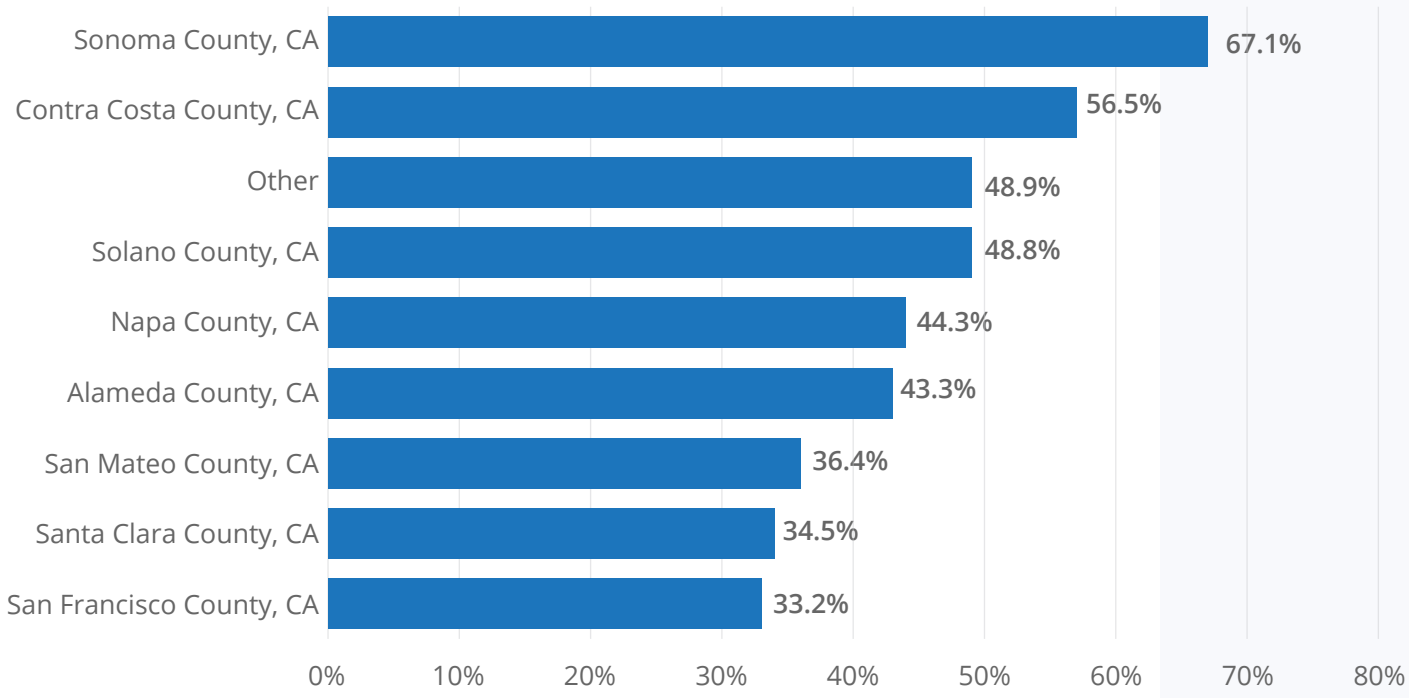
In 2023, the number of residents who commute within Marin County totaled 40,303 workers, a 2.3% decline from 2013. More importantly, Marin County residents make up just 36.4% of the local workforce, a steep decline from their 44.3% share in 2003.

Net Job Inflow (+) or Outflow (-)



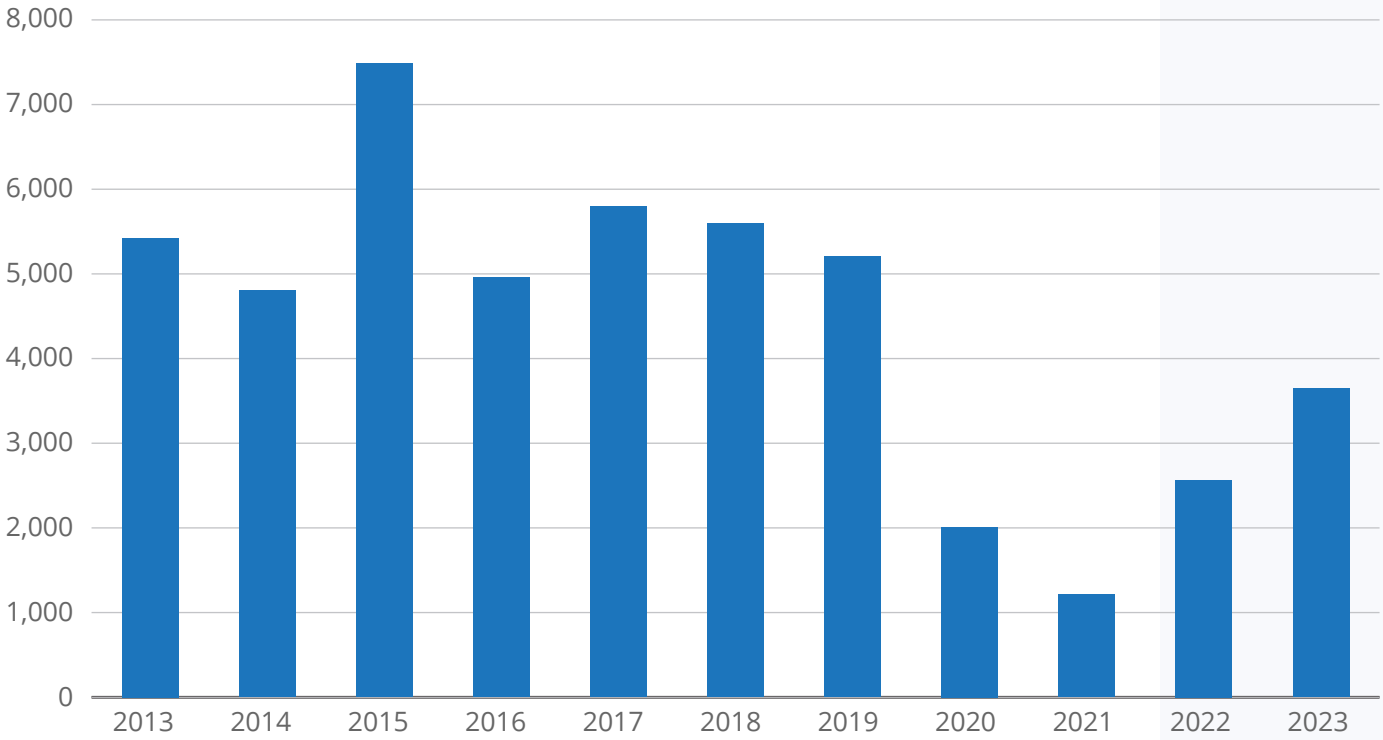
Source: U.S. Census Bureau. Analysis by Beacon Economics.

County Residents Share of County Employment



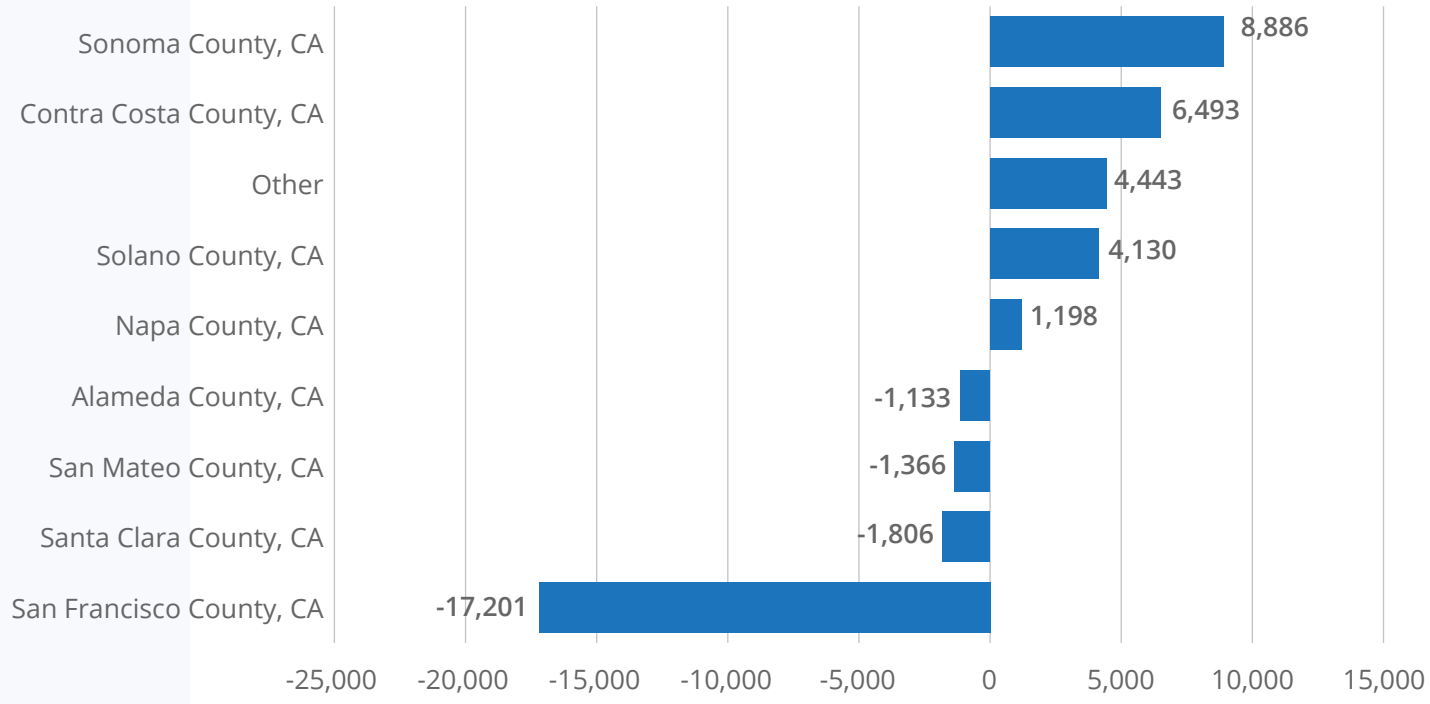
Source: U.S. Census Bureau. Analysis by Beacon Economics.

Marin County Net Commuters



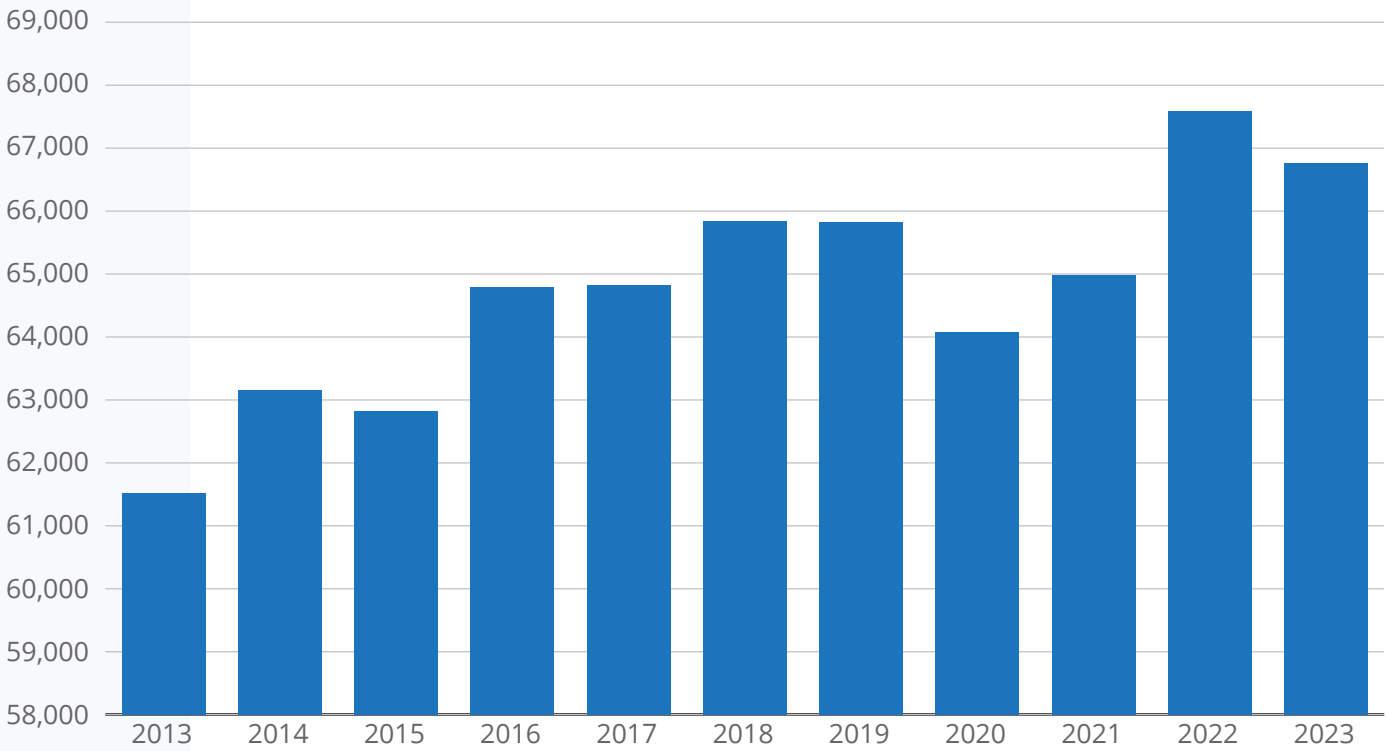
Source: California Employment Development Department. Analysis by Beacon Economics.

2023 Marin County Net Commuters



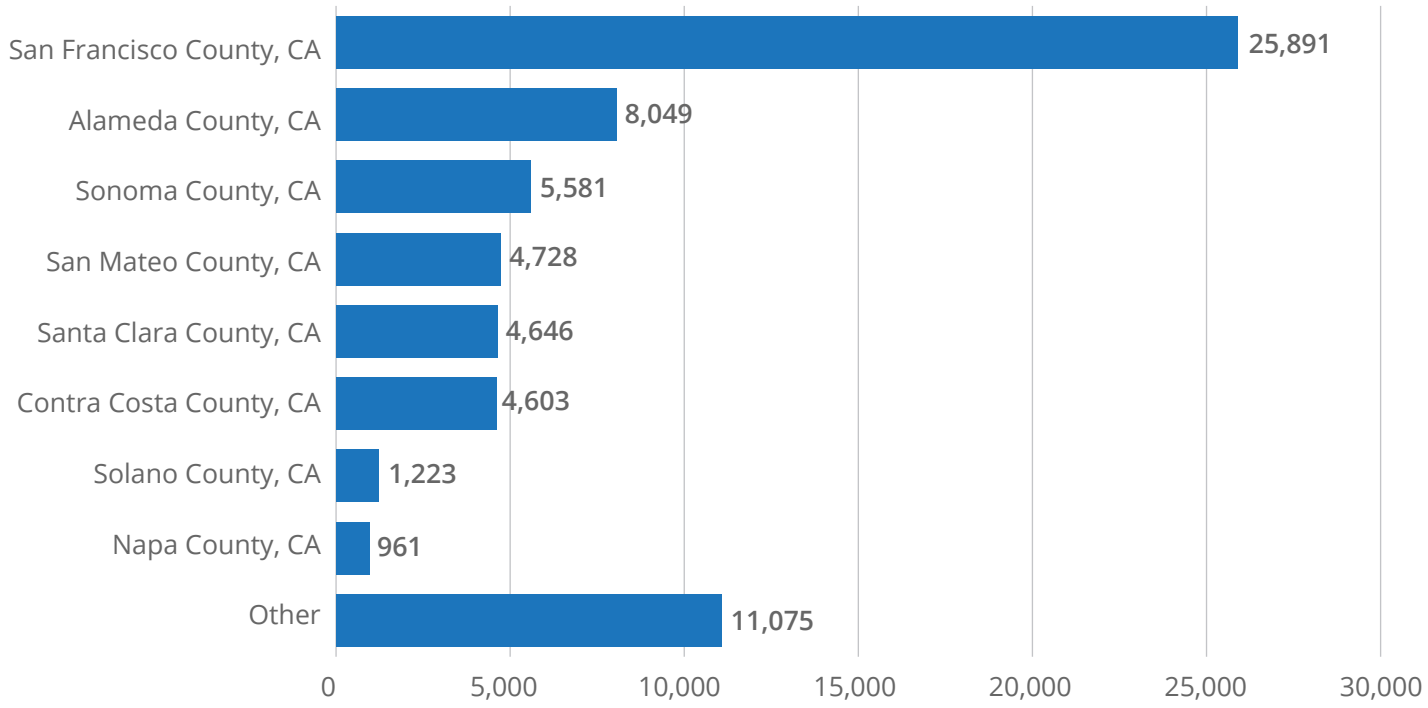
Source: U.S. Census Bureau. Analysis by Beacon Economics.

Marin County Outbound Commuters



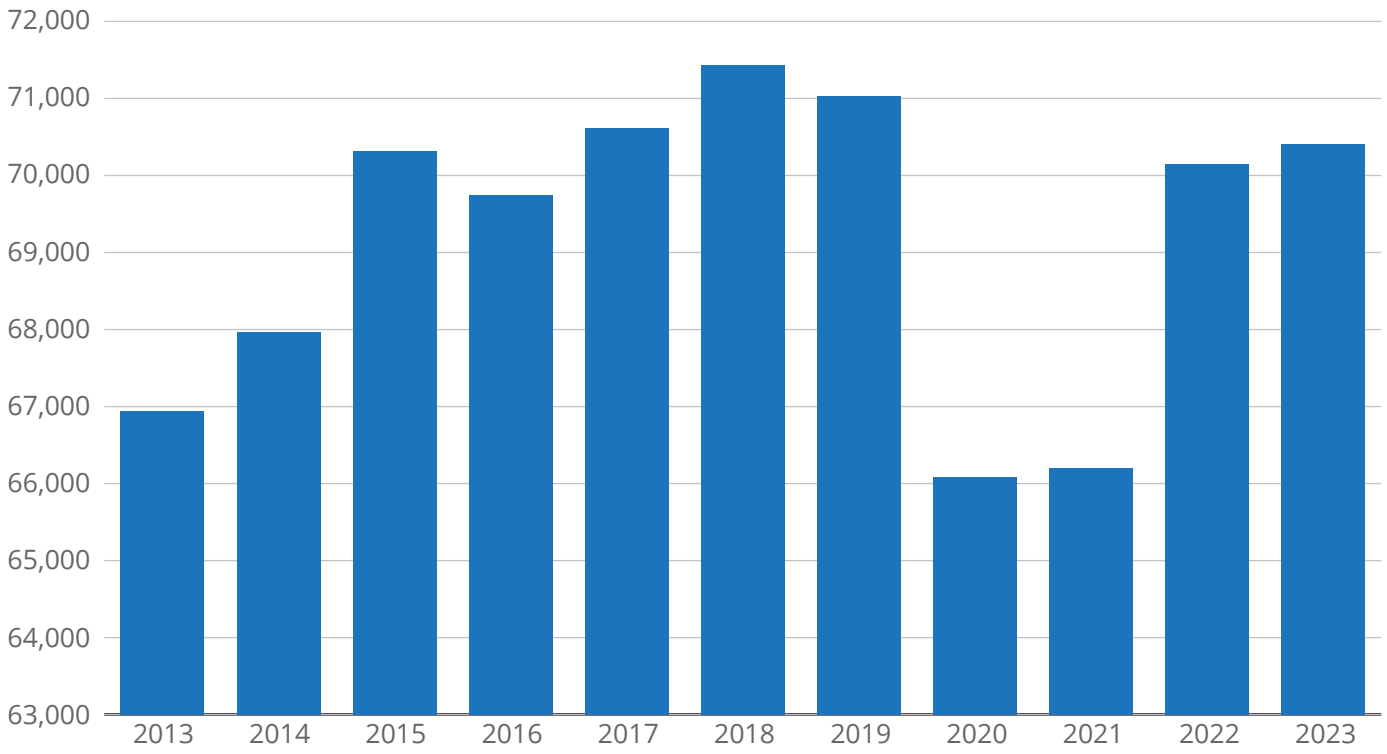
Source: U.S. Census Bureau. Analysis by Beacon Economics.

2023 Outbound Commuters



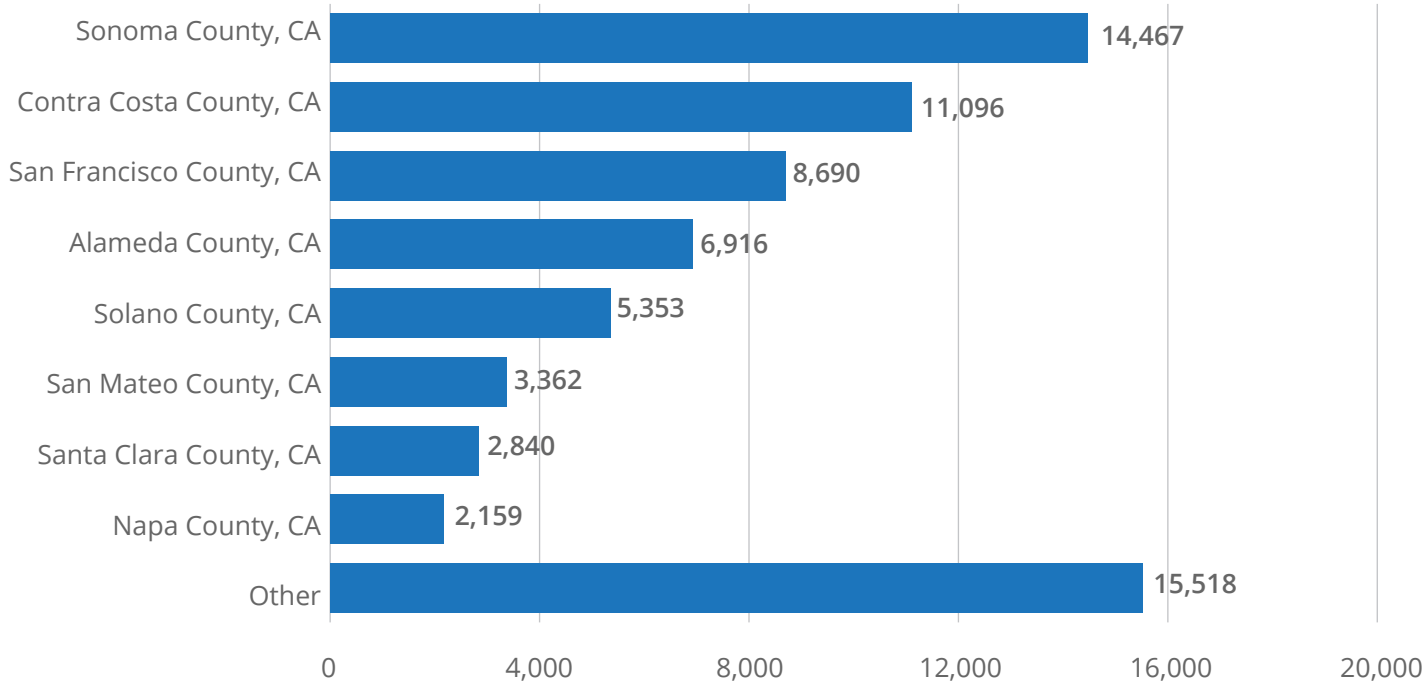
Source: U.S. Census Bureau. Analysis by Beacon Economics.

Marin County Inbound Commuters



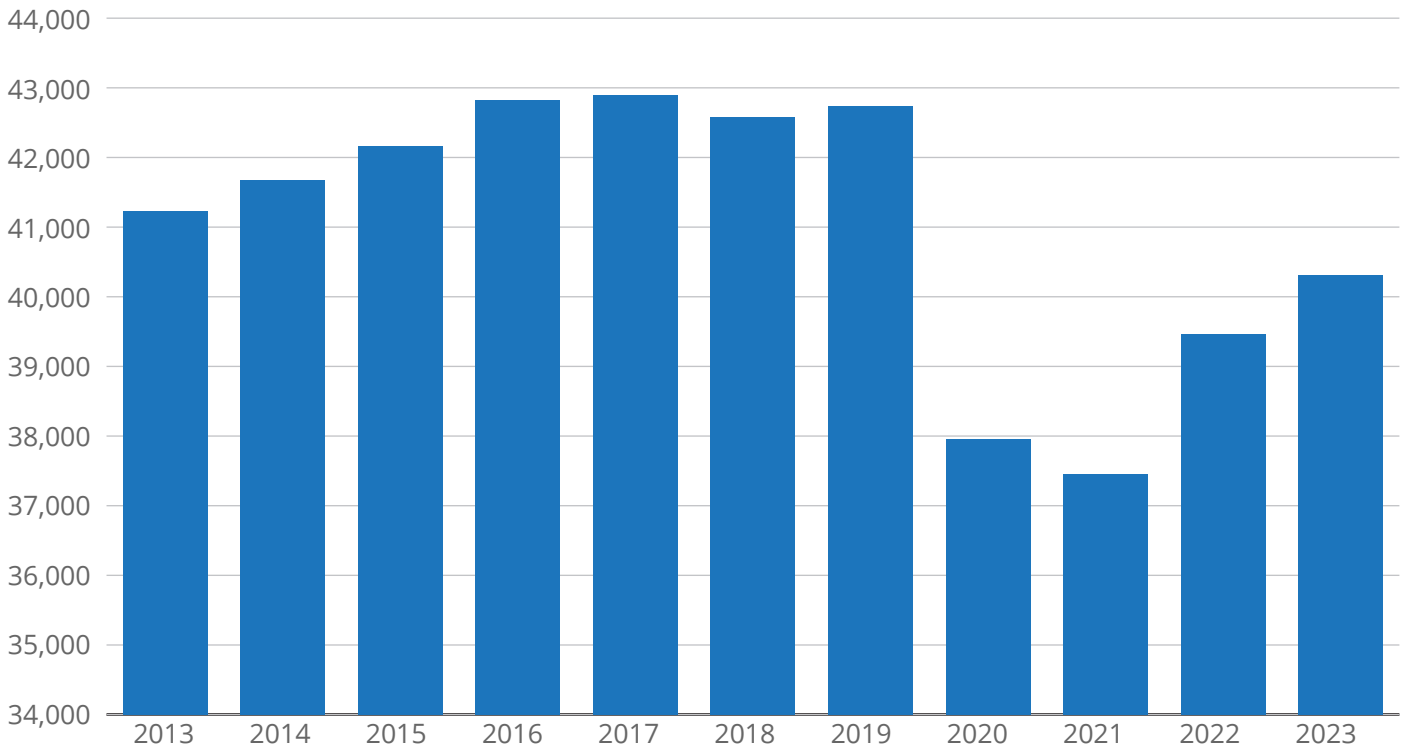
Source: U.S. Census Bureau. Analysis by Beacon Economics.

2023 Inbound Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.

Marin County Local Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.

Marin County Commuting by Subregion

The following section highlights commuting patterns in Marin County by the following subregions:

- Central Marin
- Novato
- San Rafael
- Southern Marin
- West Marin





Central Marin

Encompassing Larkspur, Corte Madera, Greenbrae, Kentfield, Ross, and San Anselmo, Central Marin is a residential, educational, and commercial hub. Its parks, open spaces, and recreational facilities contribute to the region's exceptional quality of life.

In 2023, the Central Marin region saw a net inflow of 388 workers.

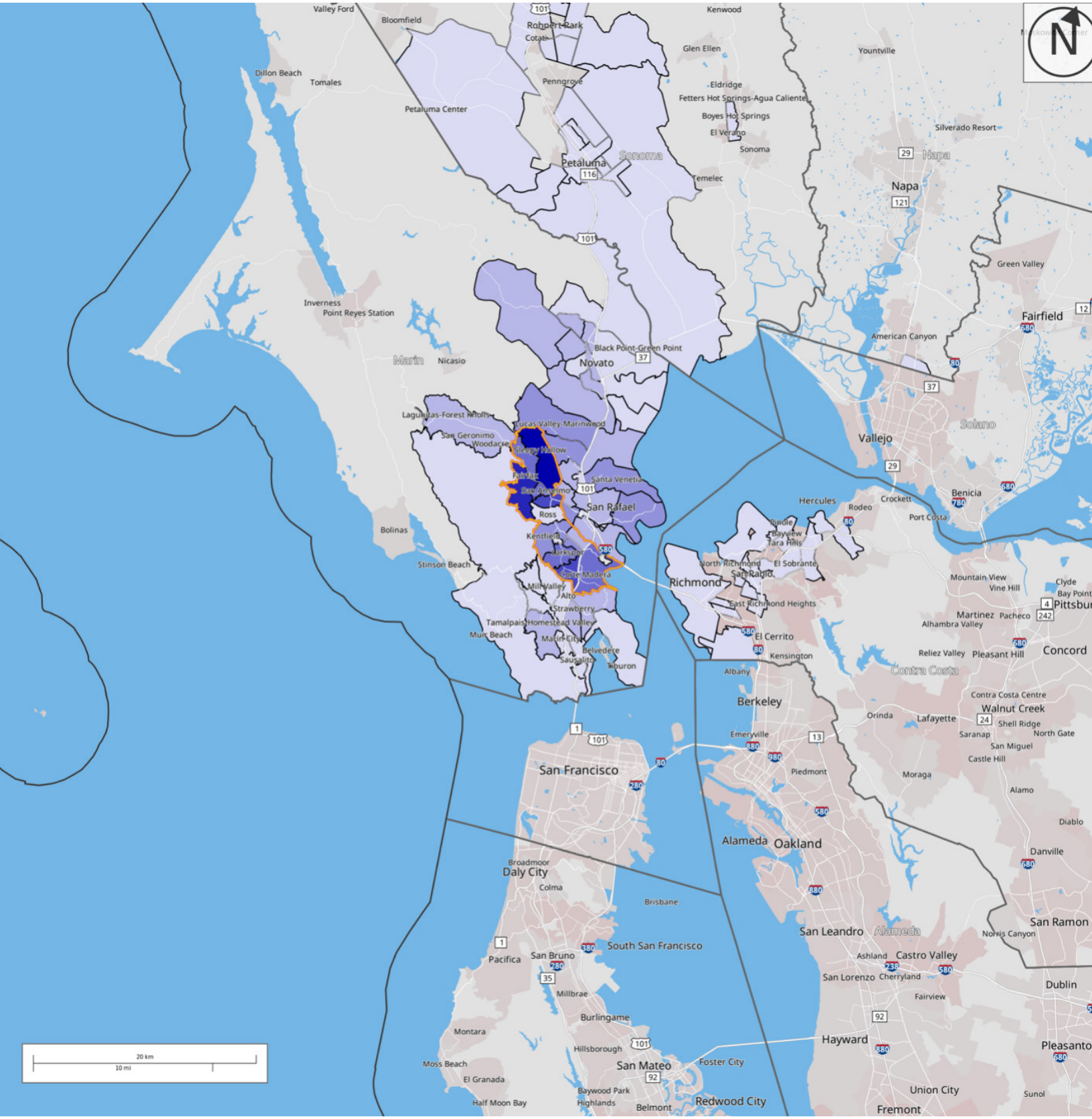
- Net inflows came primarily from Contra Costa, Sonoma, Solano, and Napa counties.
- Net outflows were primarily to San Francisco, Santa Clara, San Mateo, and Alameda counties.

In 2023, the number of outbound commuters from Central Marin to areas outside Marin County totaled 14,491 workers, a 30.5% increase over the last decade. The most popular destinations for outbound commuters were San Francisco, Alameda, Santa Clara, San Mateo, and Contra Costa counties.

In the same year, the number of inbound commuters to Central Marin from areas outside Marin County totaled 15,179 workers, a 6.2% increase over the last ten years. The most common home counties for inbound commuters were Contra Costa, Sonoma, San Francisco, Alameda, and Solano counties.

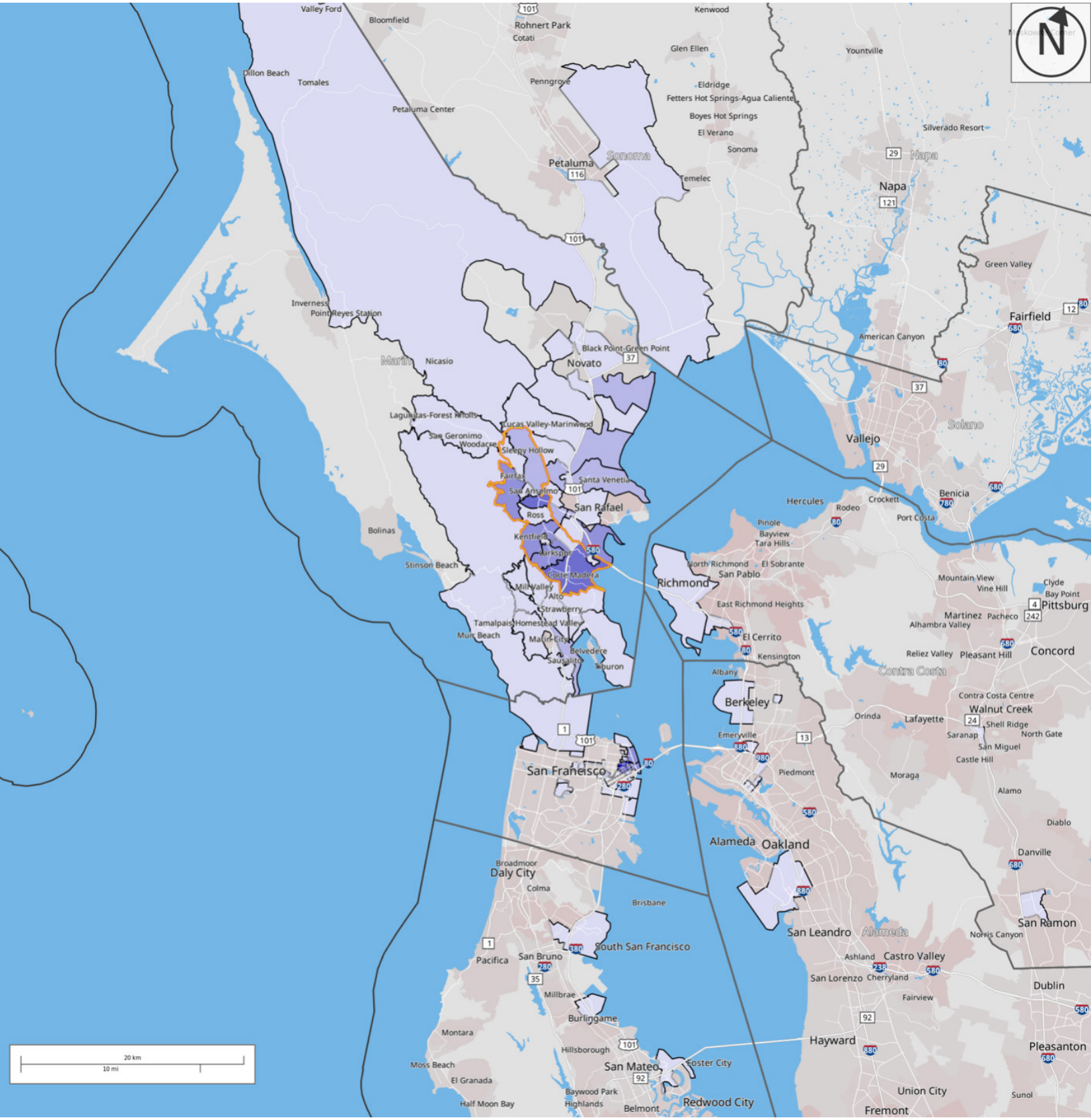
In 2023, the number of Central Marin residents who commute within Marin County totaled 8,750 workers, a 0.2% increase from 2013.

Commuting Map for Workers in Central Marin [1]



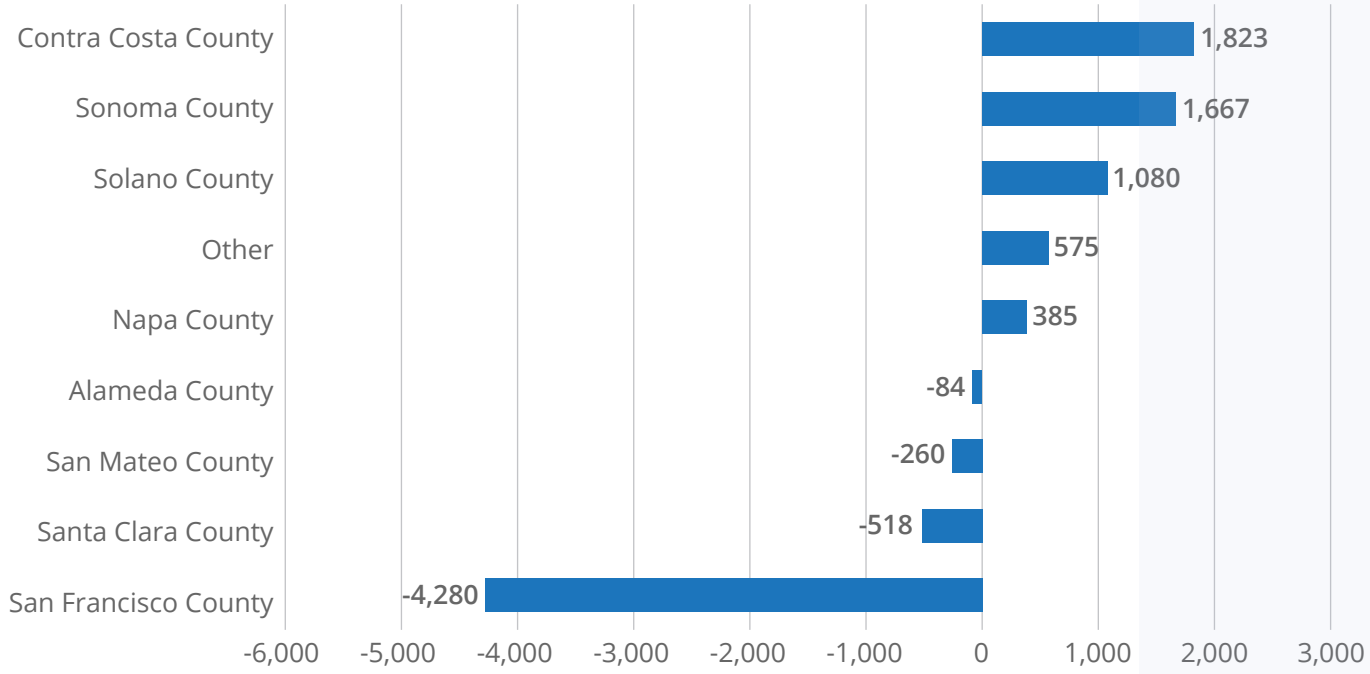
[1] Top 100 Census tracks where Central Marin workers live

Commuting Map for Residents of Central Marin[2]



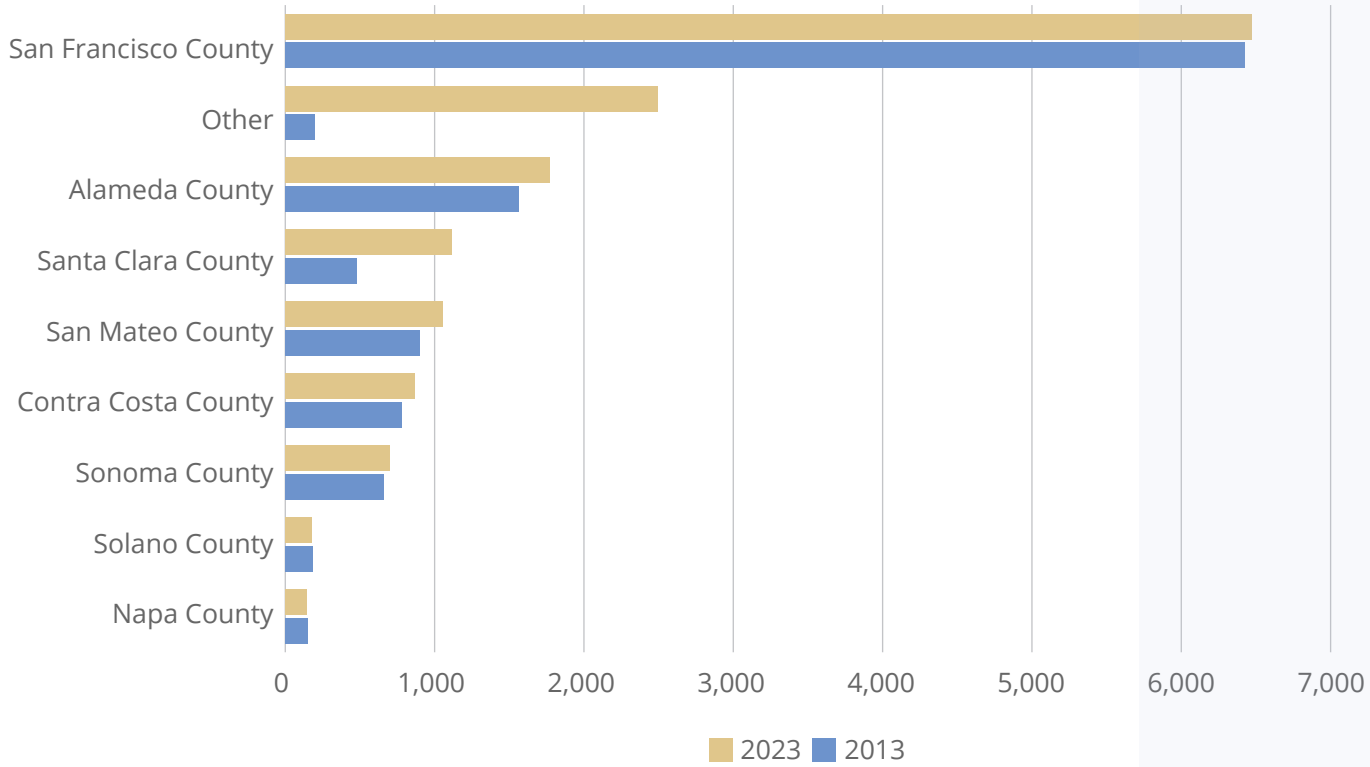
[2] Top 100 Census tracks where Central Marin residents work

2023 Central Marin Net Commuting



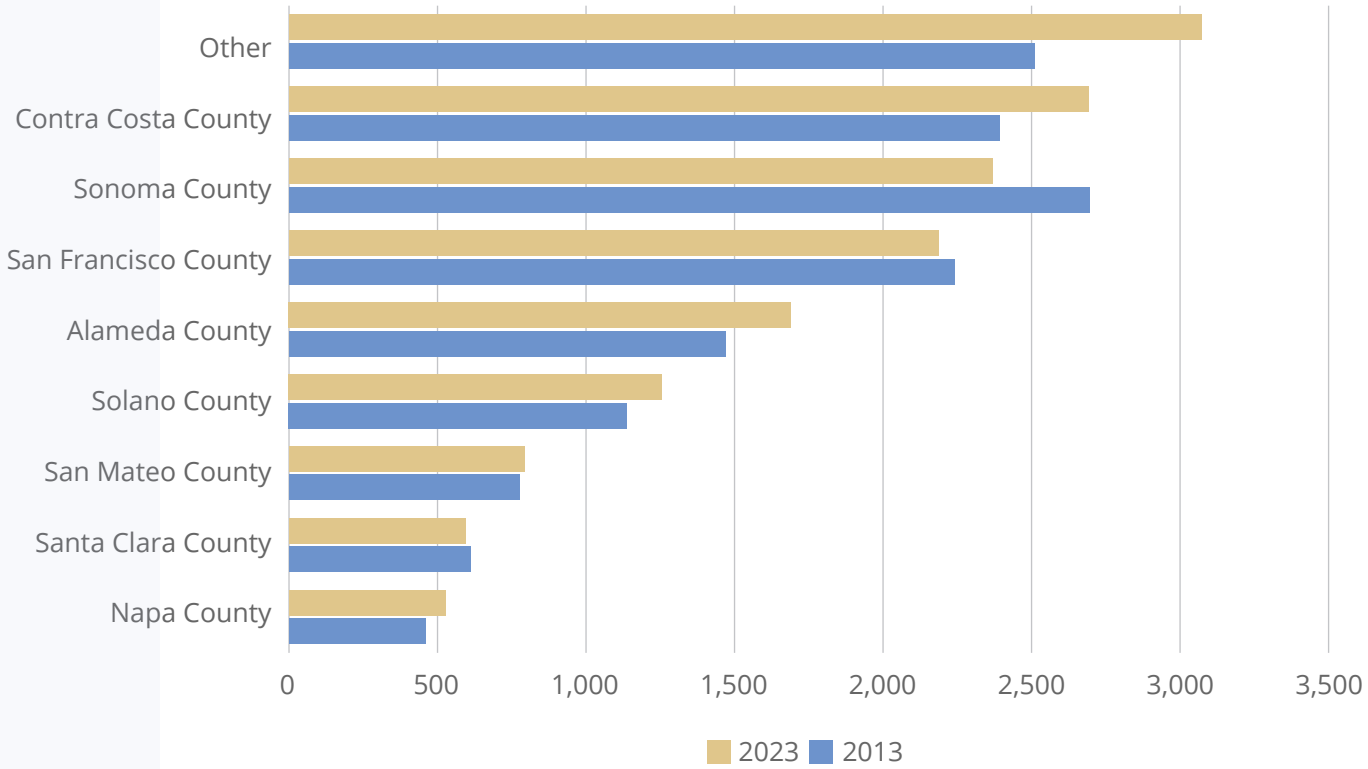
Source: U.S. Census Bureau. Analysis by Beacon Economics.

Central Marin Outbound Commuters



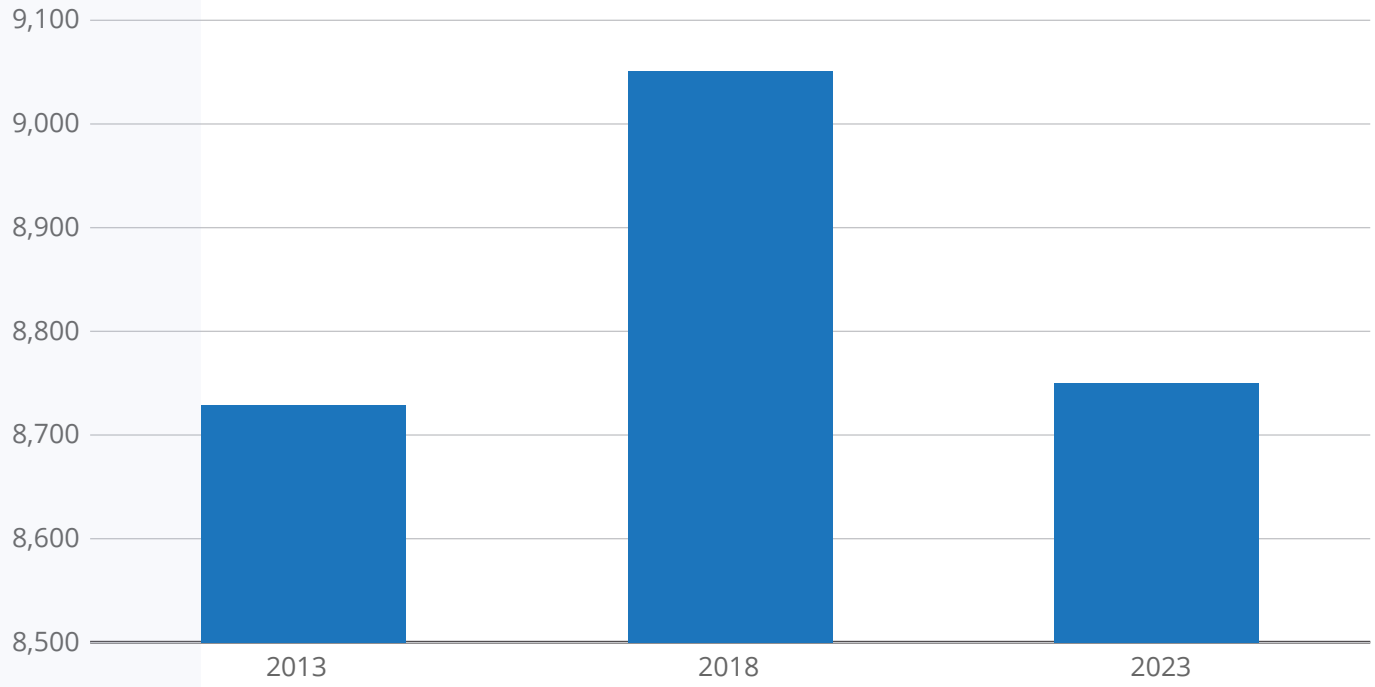
Source: U.S. Census Bureau. Analysis by Beacon Economics.

Central Marin Inbound Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.

Central Marin Local Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.



Novato

Characterized by a mix of residential neighborhoods, employment centers, and extensive open spaces, the Novato region serves as the northern gateway to Marin County. Its economy is supported by technology, healthcare, education, retail, and recreation. The Novato region's strategic location along U.S. Highway 101 makes it an important center for economic development, housing, and regional connectivity in Marin County.

In 2023, the Novato region saw a net inflow of 216 workers from outside Marin County.

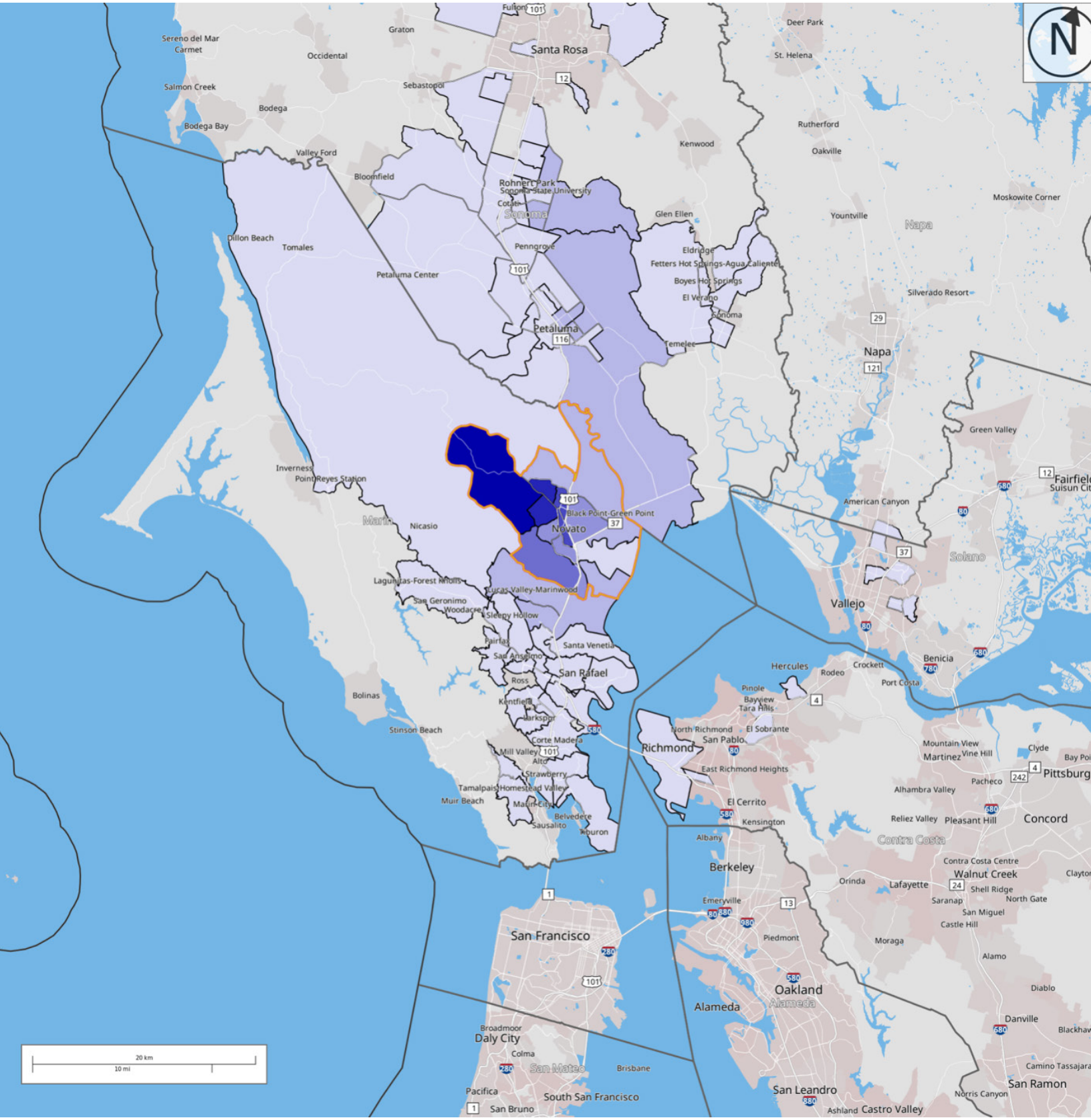
- Net inflows came primarily from Sonoma, Solano, Contra Costa, and Napa counties.
- Net outflows were primarily to San Francisco, Alameda, Santa Clara, and San Mateo counties.

In 2023, the number of outbound commuters from Novato to areas outside Marin County totaled 16,817, a 30.3% increase over the last decade. The most popular destinations for outbound commuters were San Francisco, Sonoma, Alameda, Contra Costa, and San Mateo counties.

In 2023, the number of inbound commuters to Novato from areas outside Marin County totaled 17,033 workers, a 16.4% increase over the last ten years. The most common home counties for inbound commuters were Sonoma, Contra Costa, Solano, Alameda, and San Francisco counties.

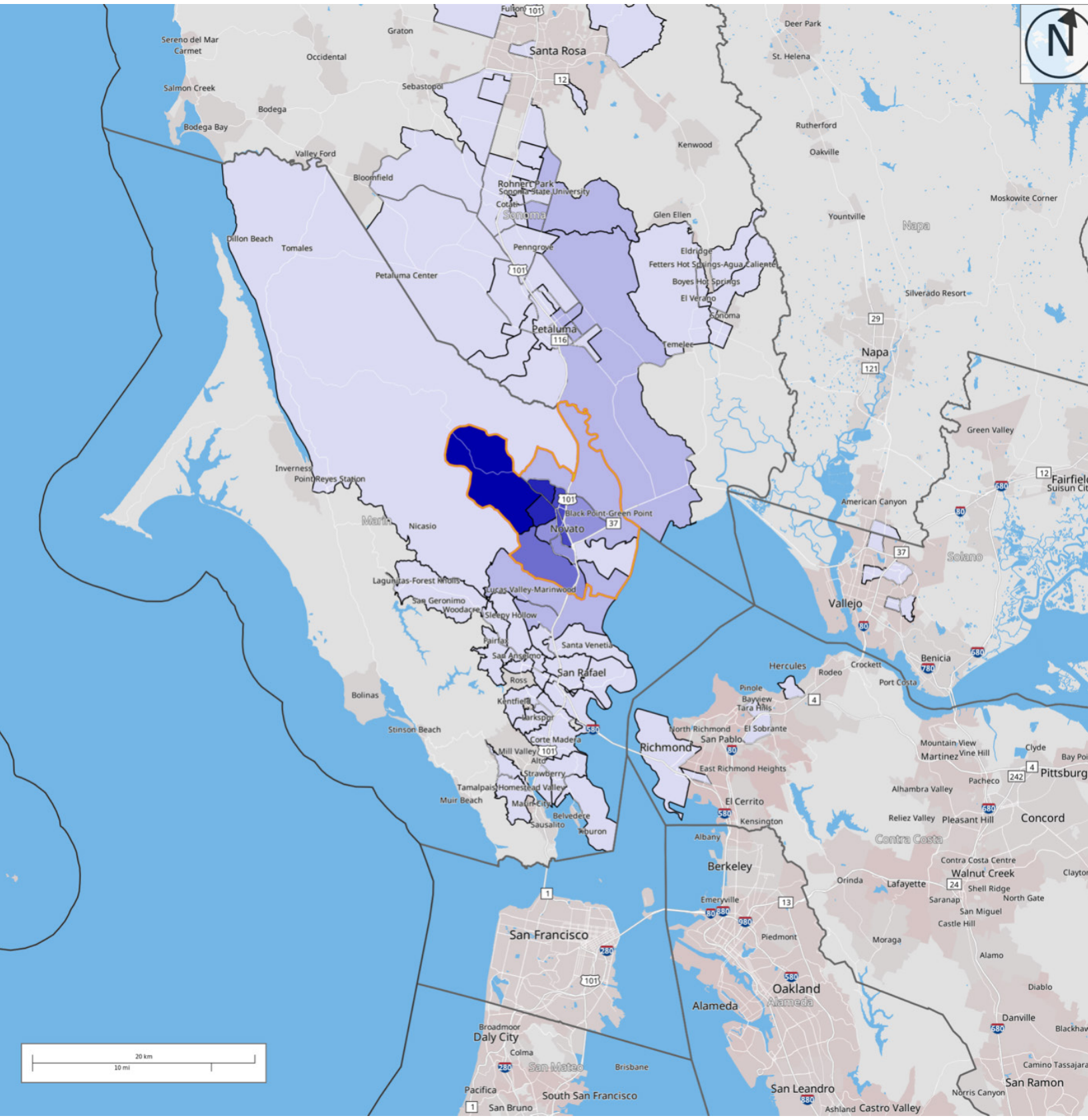
In 2023, the number of Novato residents who commute within Marin County totaled 11,684, a 1.8% decline from 2013.

Commuting Map for Workers in Novato[3]



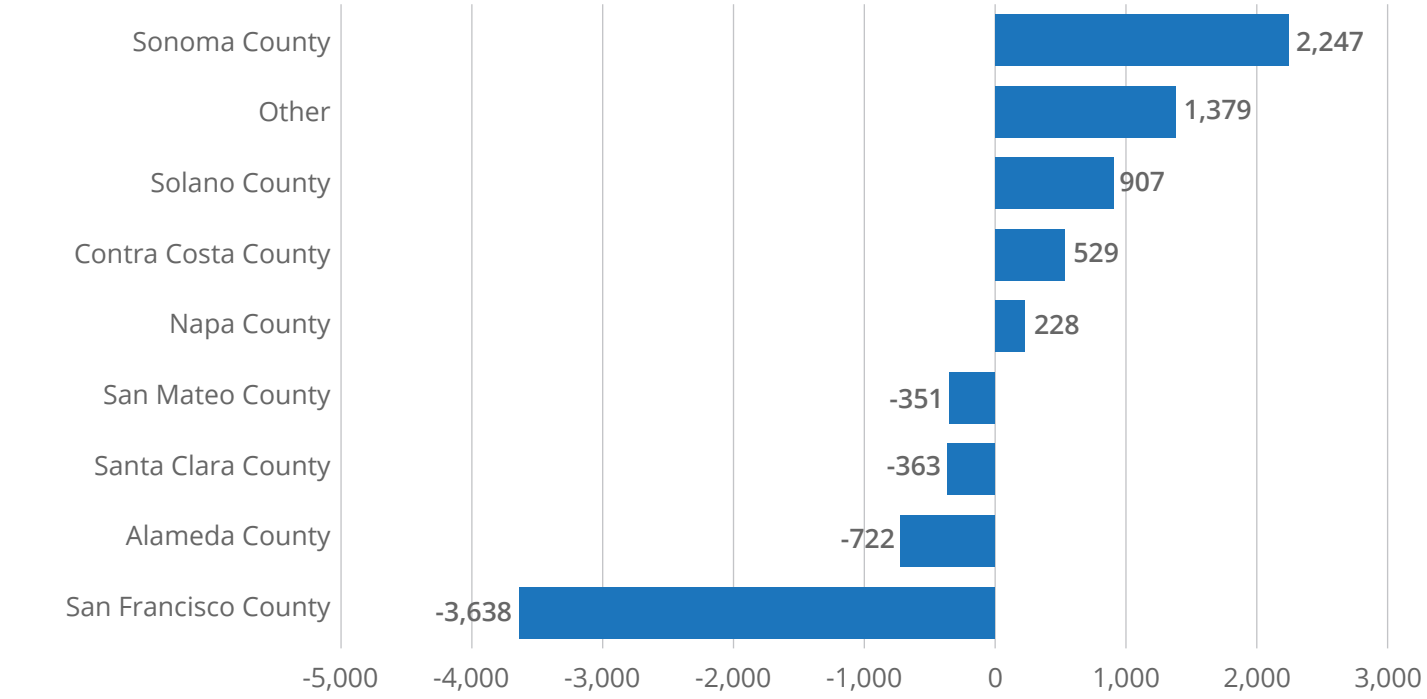
[3] Top 100 Census tracks where Novato workers live

Commuting Map for Residents of Novato[4]



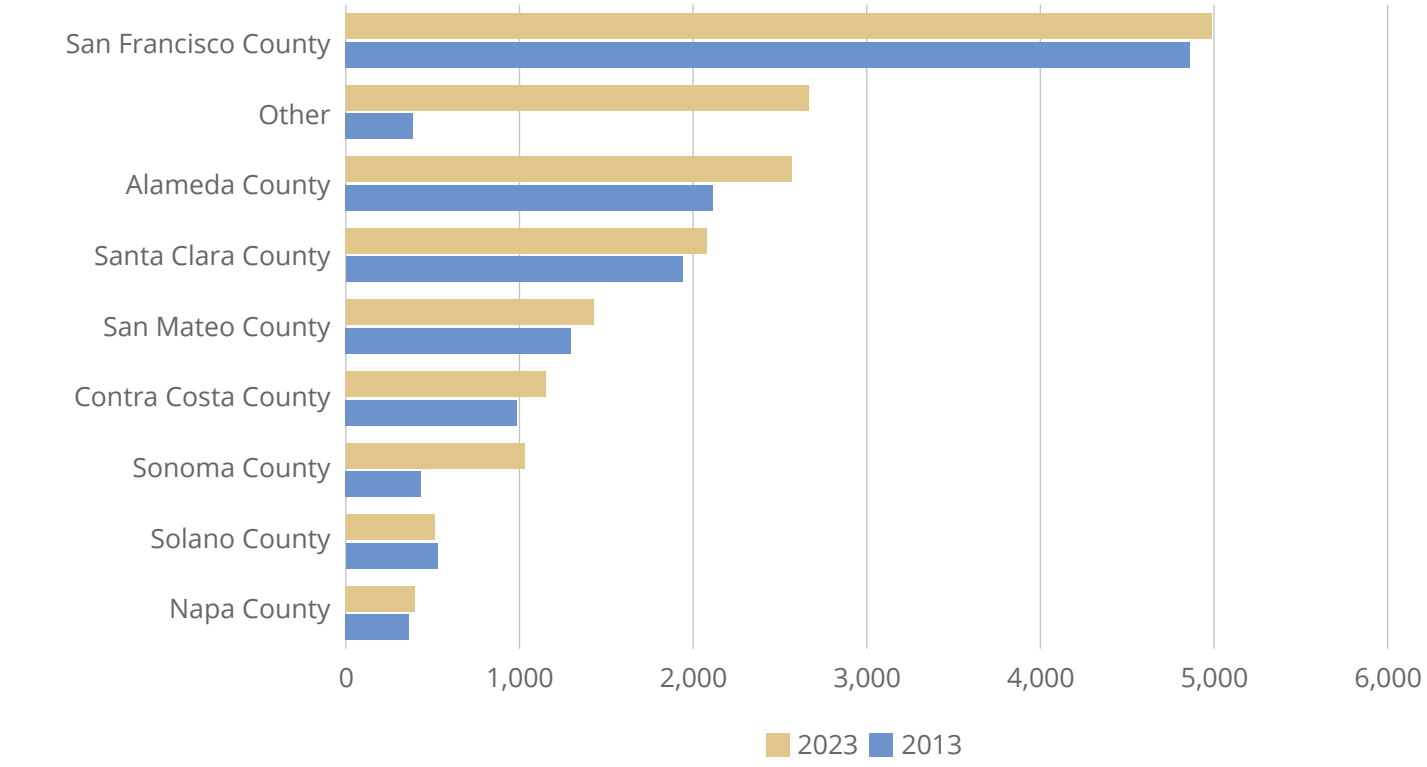
[4] Top 100 Census tracks where Novato residents work

2023 Novato Net Commuting



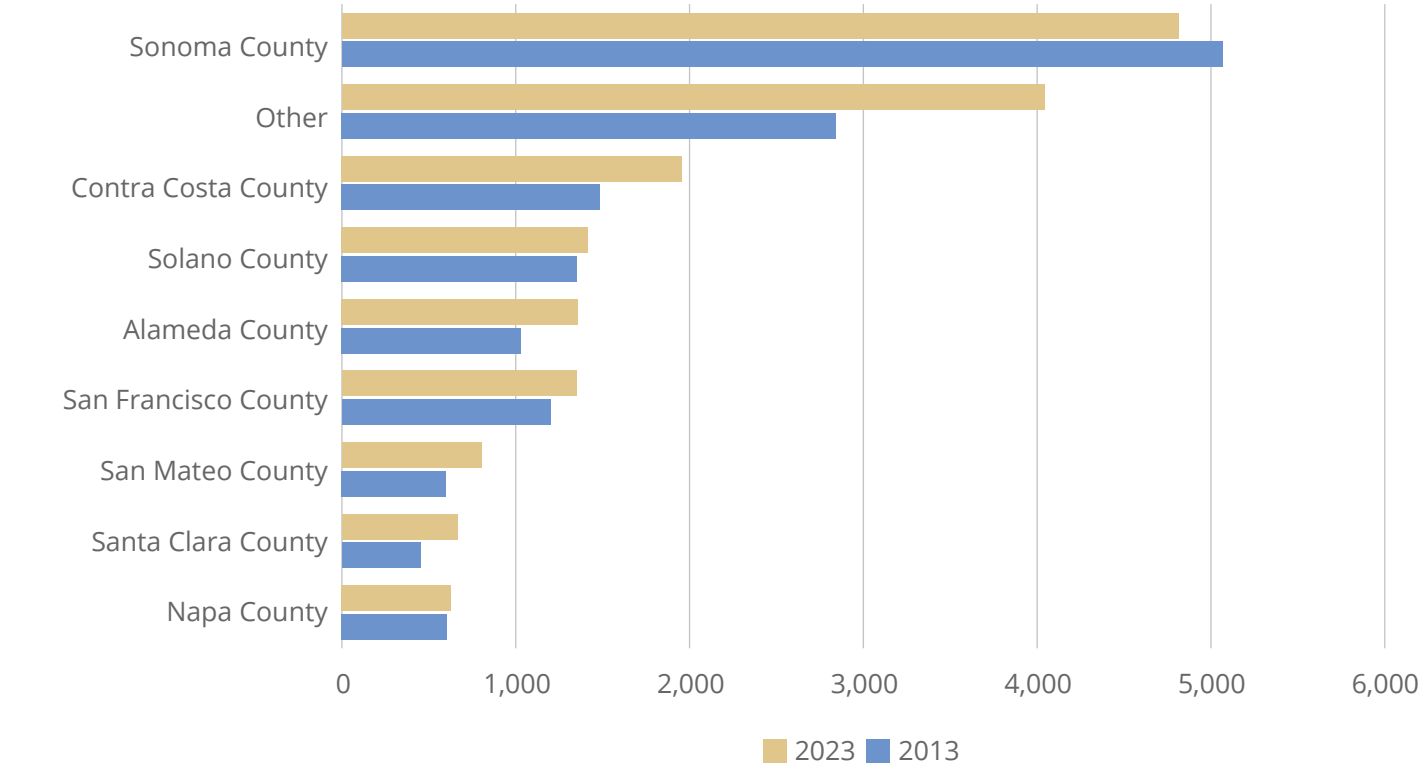
Source: U.S. Census Bureau. Analysis by Beacon Economics.

Novato Outbound Commuters



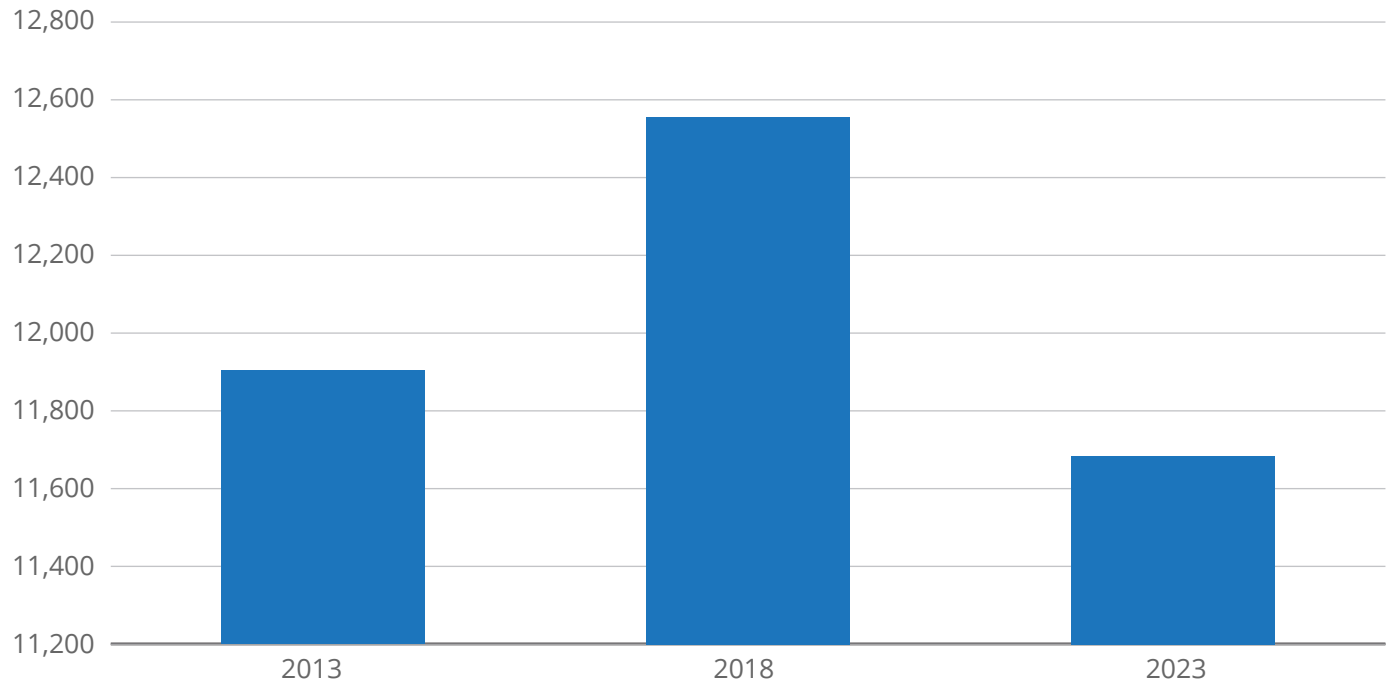
Source: U.S. Census Bureau. Analysis by Beacon Economics.

Novato Inbound Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.

Novato Local Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.



San Rafael

The San Rafael region is the civic, governmental, and commercial heart of Marin County, centered on the City of San Rafael. The region features a mix of residential neighborhoods, employment centers, healthcare facilities, educational institutions, and shopping districts that primarily serve local residents. Surrounded by rolling hills, the San Francisco Bay, and expansive open space, it offers regional connectivity and access to recreational amenities not found in other parts of the Bay Area. As one of Marin County's main population and employment centers, the San Rafael region plays a vital role in providing public services and supporting economic activity.

The San Rafael region saw a net inflow of 6,801 workers from outside Marin County in 2023.

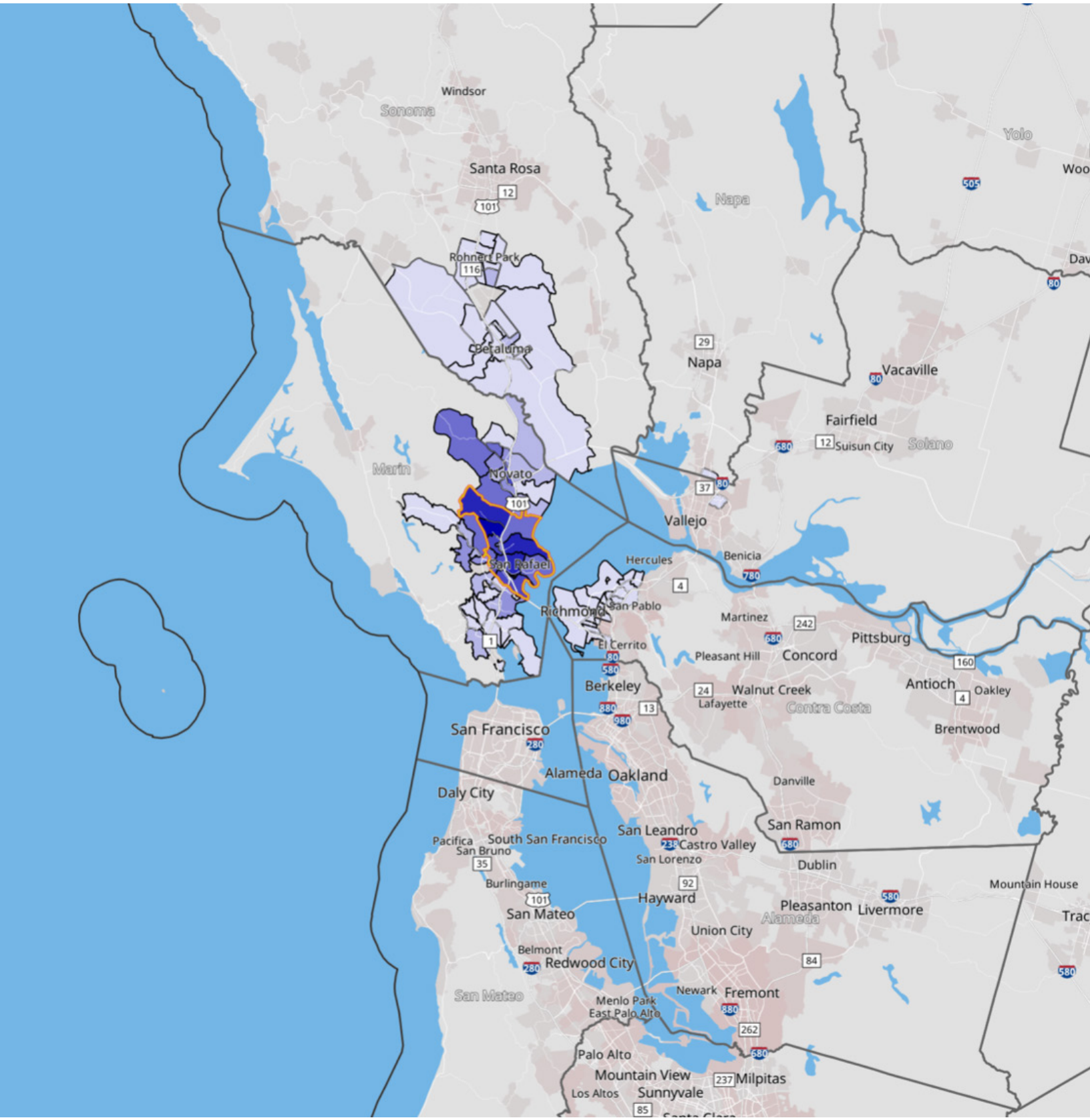
- Net inflows came primarily from Sonoma, Contra Costa, Solano, Napa, and Alameda counties.
- Net outflows were primarily to San Francisco, Santa Clara, and San Mateo counties.

In 2023, the number of outbound commuters from San Rafael to areas outside Marin County totaled 17,966 workers, a 3.1% increase over the last decade. The most popular destinations for outbound commuters were San Francisco, Alameda, Sonoma, Contra Costa, and Santa Clara counties.

In 2023, the number of inbound commuters to San Rafael from areas outside Marin County totaled 24,767 workers, a 2.1% decline over the last ten years. The most common home counties for inbound commuters were Sonoma, Contra Costa, Alameda, San Francisco, and Solano counties.

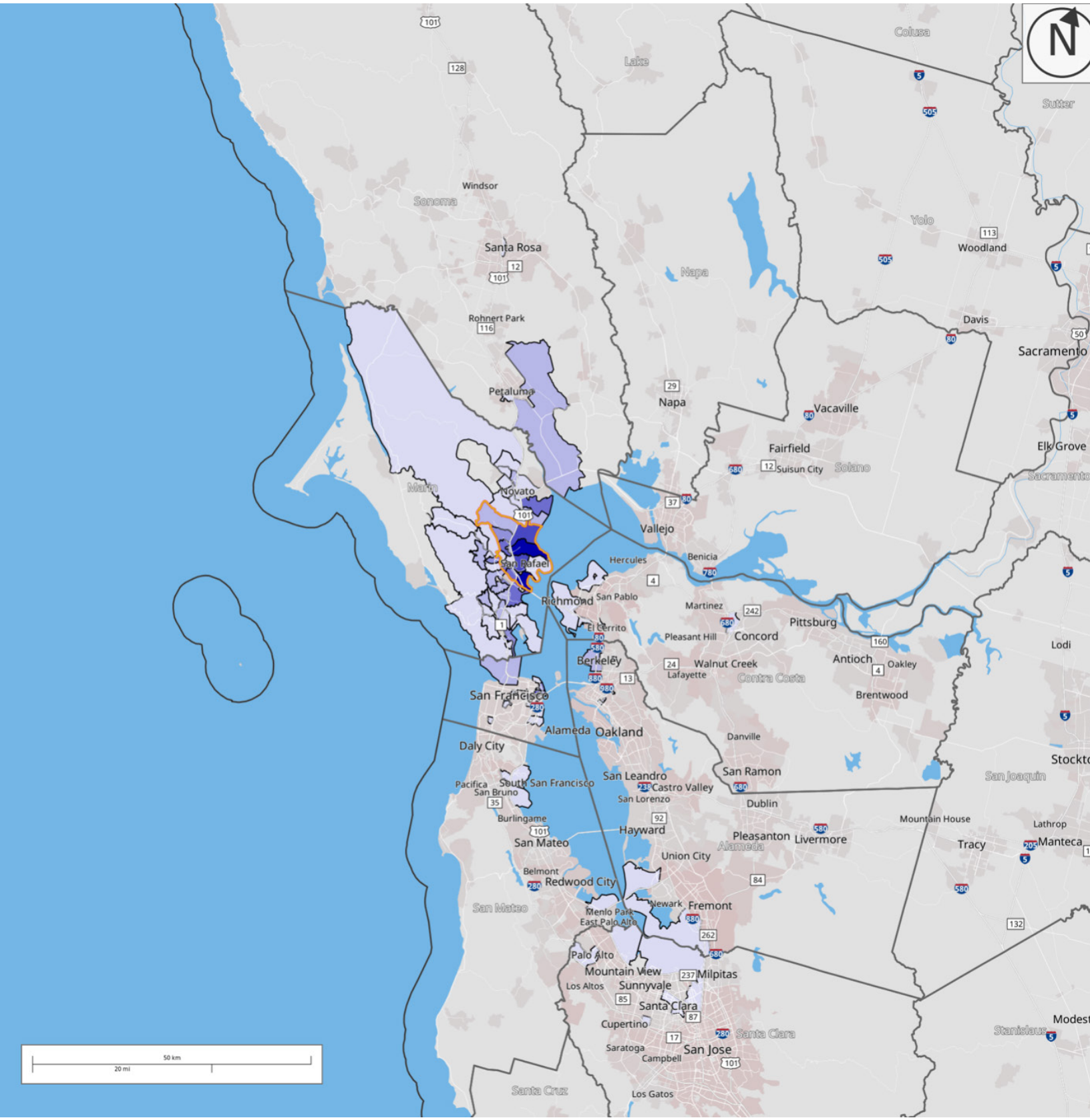
In 2023, the number of San Rafael residents who commute within Marin County totaled 12,377 workers, a 3.1% increase from 2013.

Commuting Map for Workers in San Rafael[5]



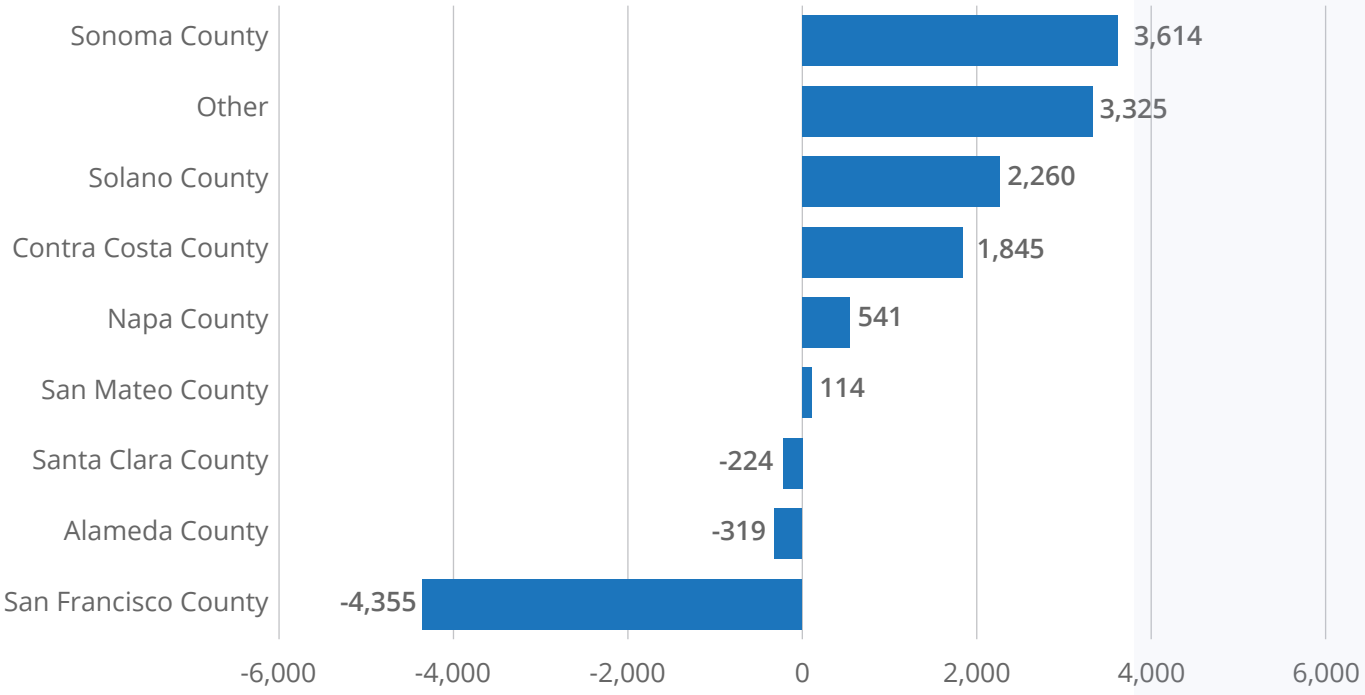
[5] Top 100 Census tracks where San Rafael workers live

Commuting Map for Residents of San Rafael[6]



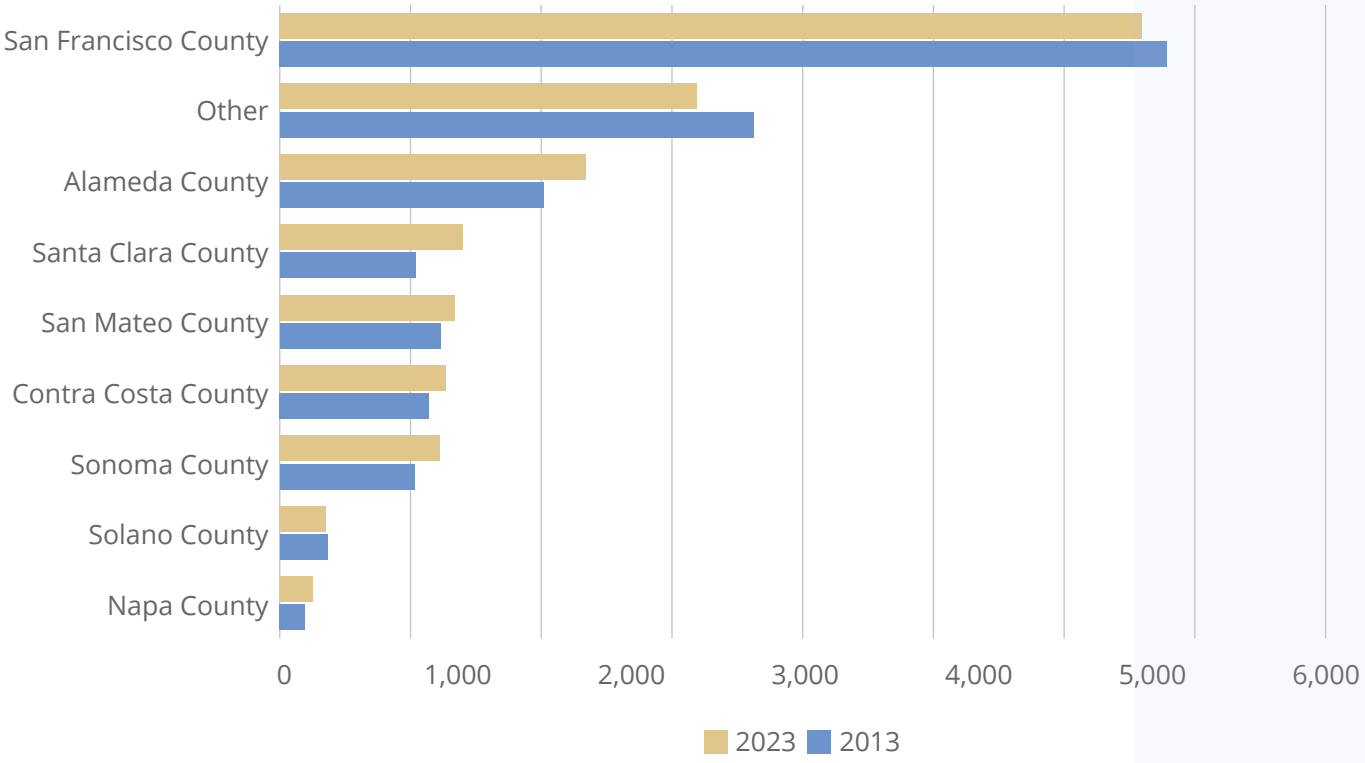
[6] Top 100 Census tracks where San Rafael residents work

2023 San Rafael Net Commuting



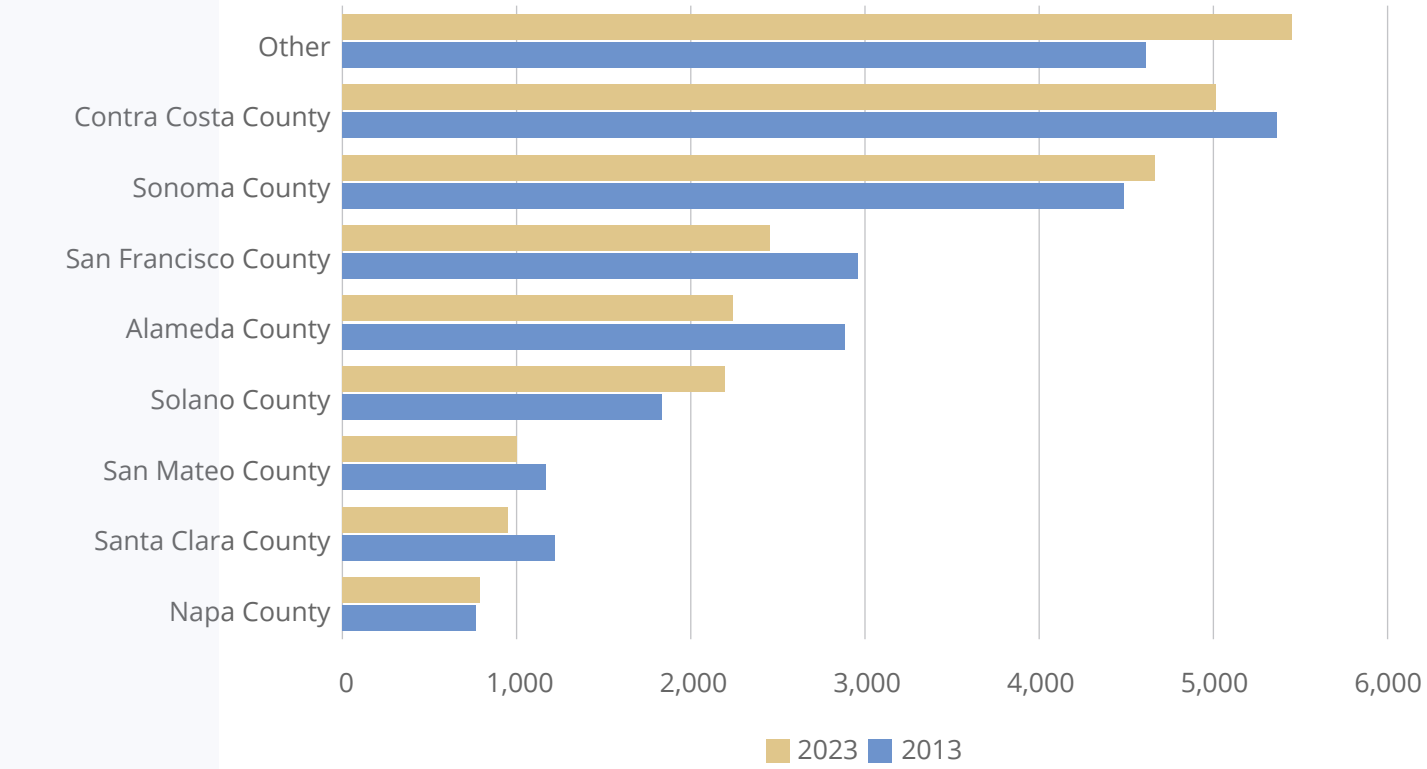
Source: U.S. Census Bureau. Analysis by Beacon Economics.

San Rafael Outbound Commuters



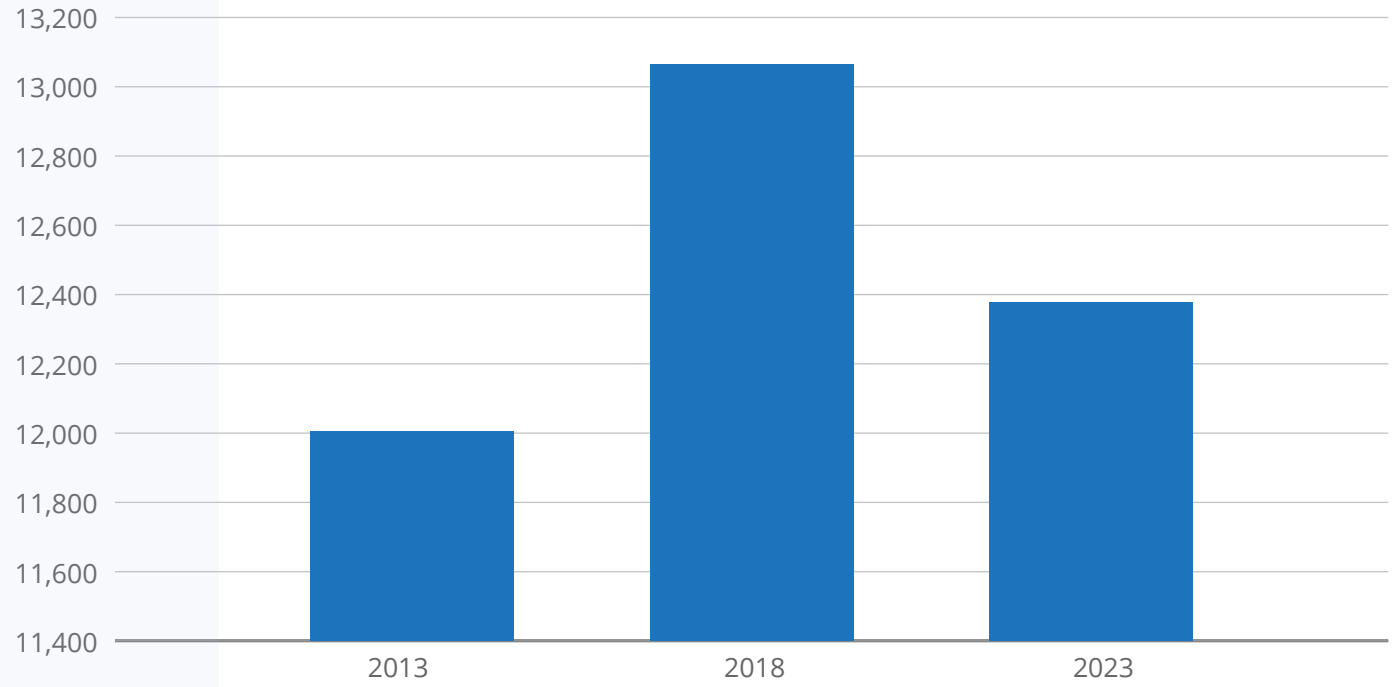
Source: U.S. Census Bureau. Analysis by Beacon Economics.

San Rafael Inbound Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.

San Rafael Local Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.



Southern Marin

Located immediately north of the Golden Gate Bridge, Southern Marin encompasses the communities of Sausalito, Mill Valley, Tiburon, Belvedere, Strawberry, Tamalpais Valley, and Marin City, forming the county's southern gateway to the San Francisco Bay Area. The region offers exceptional regional accessibility while preserving a distinctive blend of bayfront communities, hillside neighborhoods, and protected natural lands. Southern Marin is recognized for its vibrant arts and cultural attractions, recreational amenities, and strong tourism and visitor economy that is fueled by the region's natural beauty.

In 2023, the Southern Marin region saw a net outflow of 3,755 workers to counties outside Marin County.

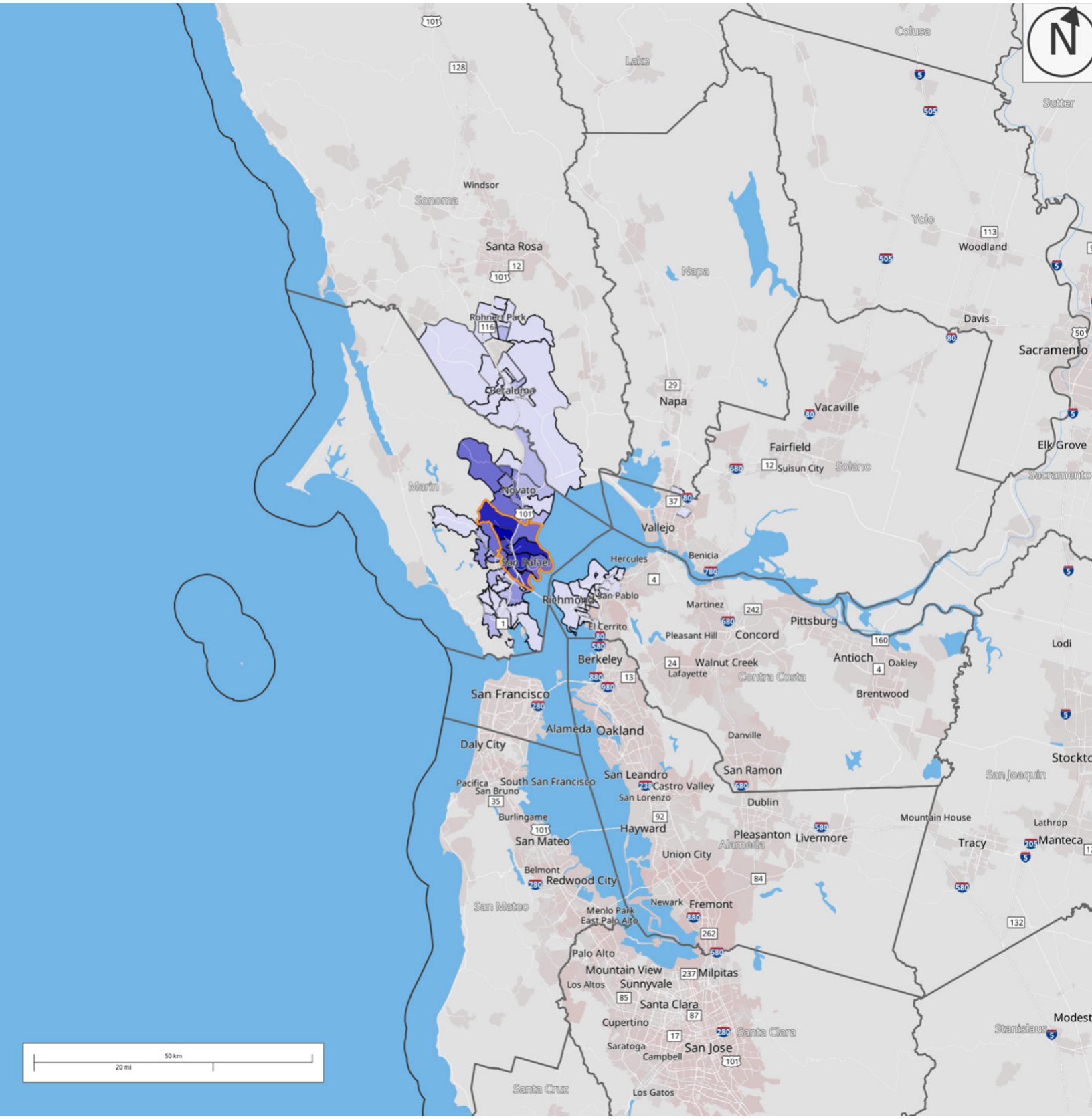
- Net inflows came primarily from Contra Costa, Sonoma, Solano, and Napa.
- Net outflows were primarily to San Francisco, Santa Clara, San Mateo, and Alameda.

In 2023, the number of outbound commuters from Southern Marin to areas outside Marin County totaled 14,632 workers, a 14.5% decline over the last decade. The most popular destinations for outbound commuters were San Francisco, Alameda, San Mateo, Santa Clara, and Contra Costa counties.

In 2023, the number of inbound commuters to Southern Marin from areas outside Marin County totaled 10,877 workers, a 1.5% increase over the last ten years. The most common home counties for inbound commuters were San Francisco, Contra Costa, Alameda, Sonoma, and San Mateo counties.

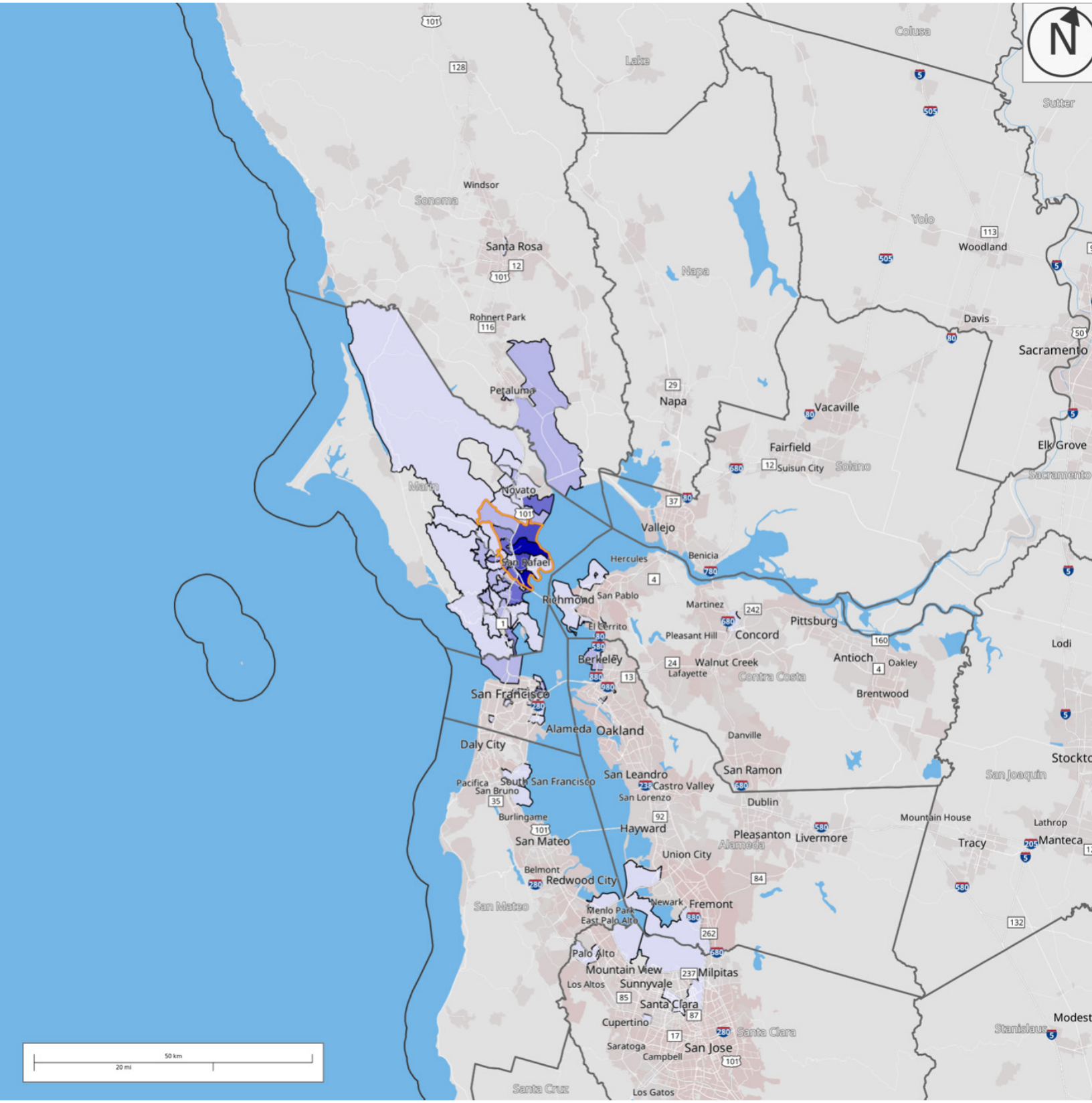
In 2023, the number of Southern Marin residents who commute within Marin County totaled 6,149 workers, a 4.2% decline from 2013.

Commuting Map for Workers in Southern Marin[7]



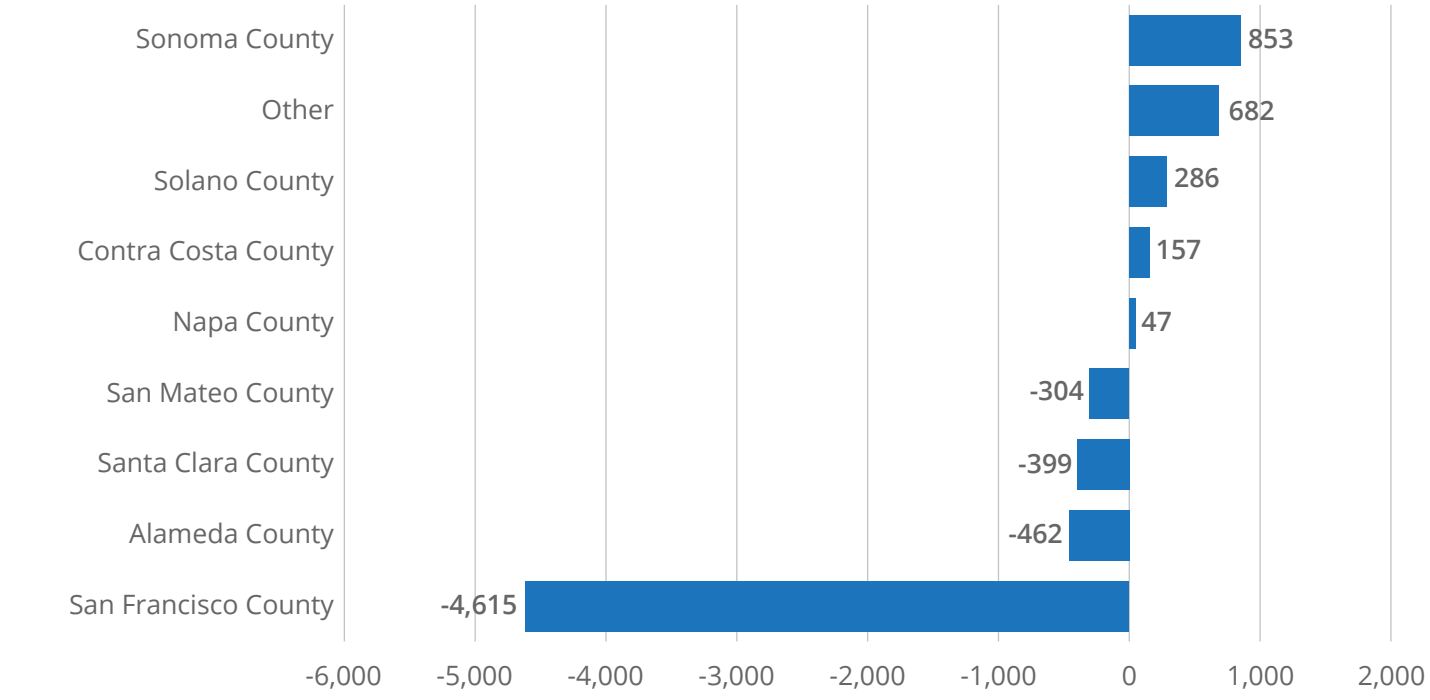
[7] Top 100 Census tracks where Southern Marin workers live

Commuting Map for Residents of Southern Marin[8]



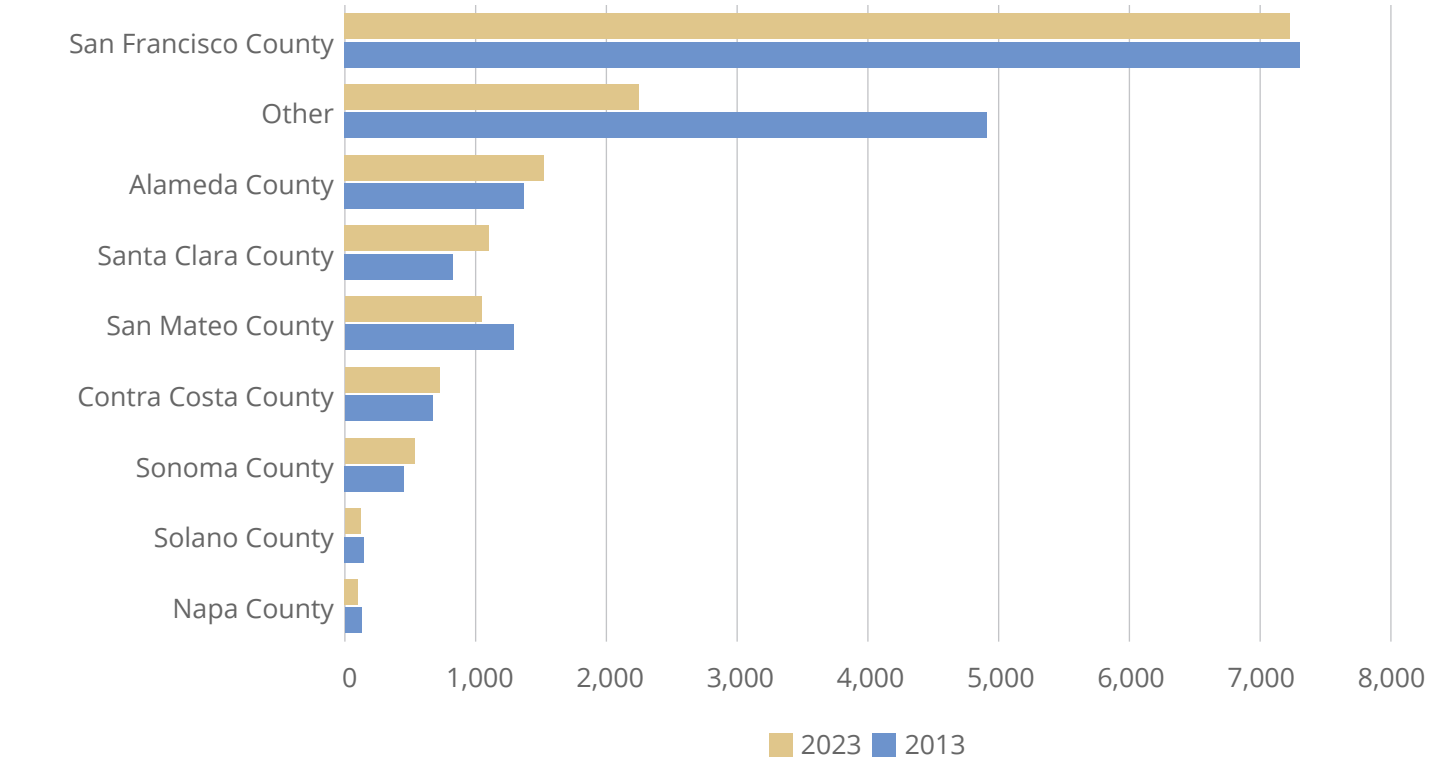
[8] Top 100 Census tracks where Southern Marin residents work

2023 Southern Marin Net Commuting



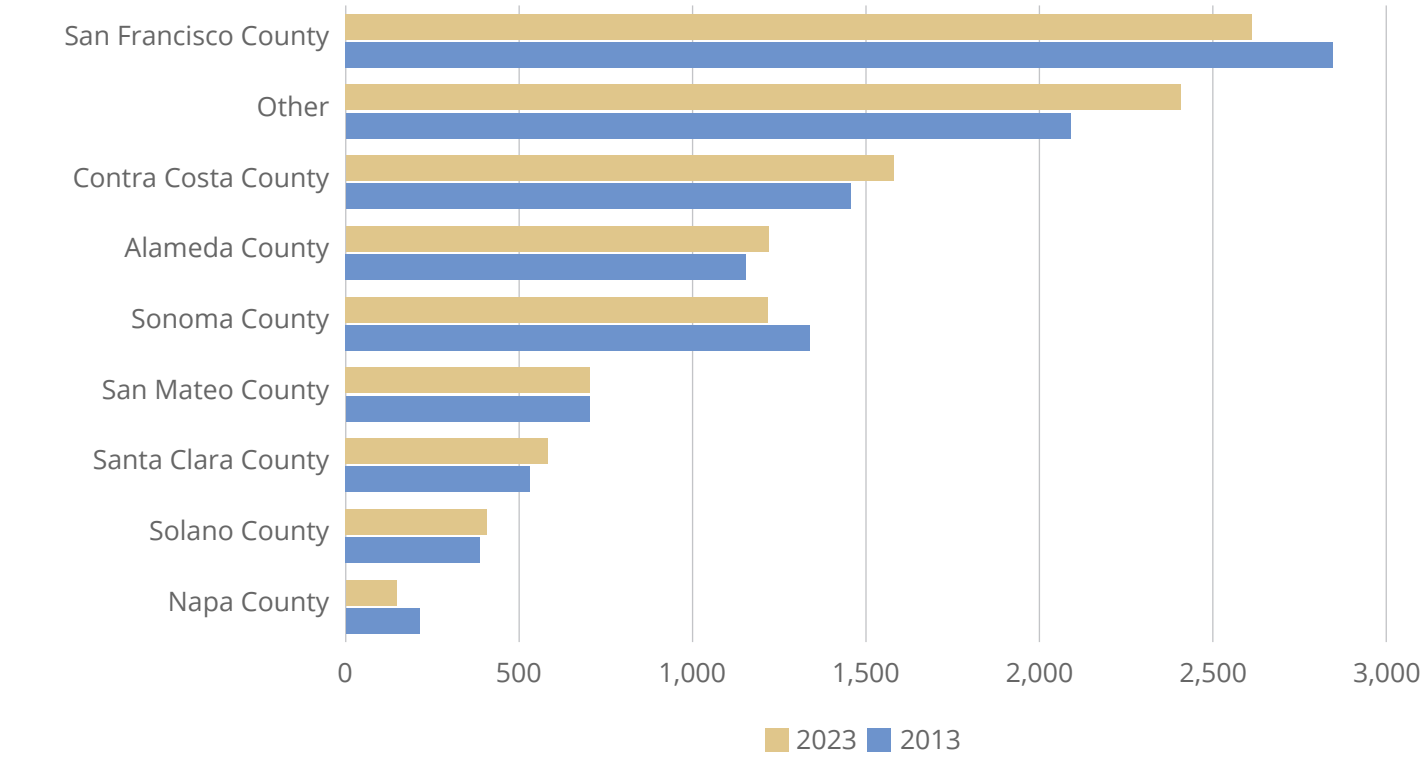
Source: U.S. Census Bureau. Analysis by Beacon Economics.

Southern Marin Outbound Commuters



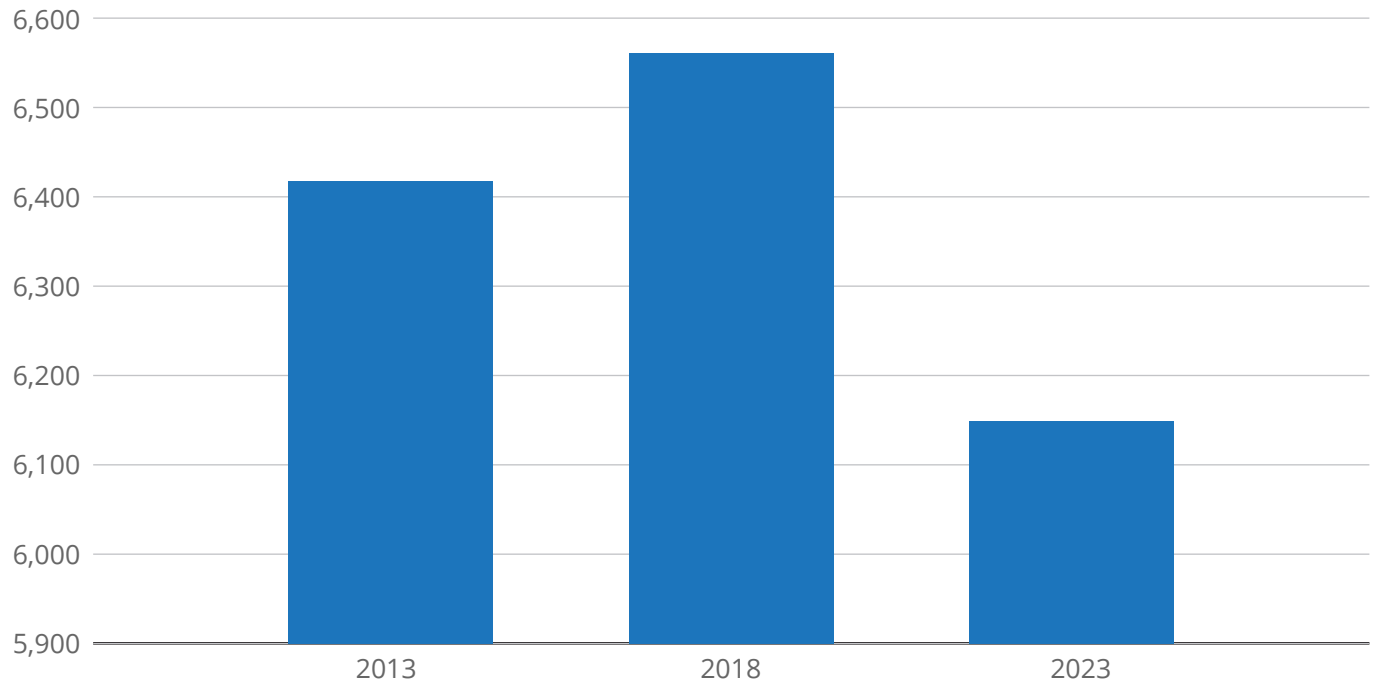
Source: U.S. Census Bureau. Analysis by Beacon Economics.

Southern Marin Inbound Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.

Southern Marin Local Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.



West Marin

West Marin is the county's rural and coastal region, encompassing communities such as Point Reyes Station, Bolinas, Stinson Beach, Inverness, Marshall, Olema, and Dillon Beach. The region is distinguished by the Pacific coastline, protected open spaces, and natural resources. Agriculture, aquaculture, tourism, and small locally owned businesses remain central to the regional economy. With its exceptional scenic beauty, historic ranches, and recreational opportunities, West Marin represents one of California's most distinctive coastal landscapes and contributes significantly to Marin County's identity.

The West Marin region saw a net outflow of 19 workers to counties outside Marin County in 2023.

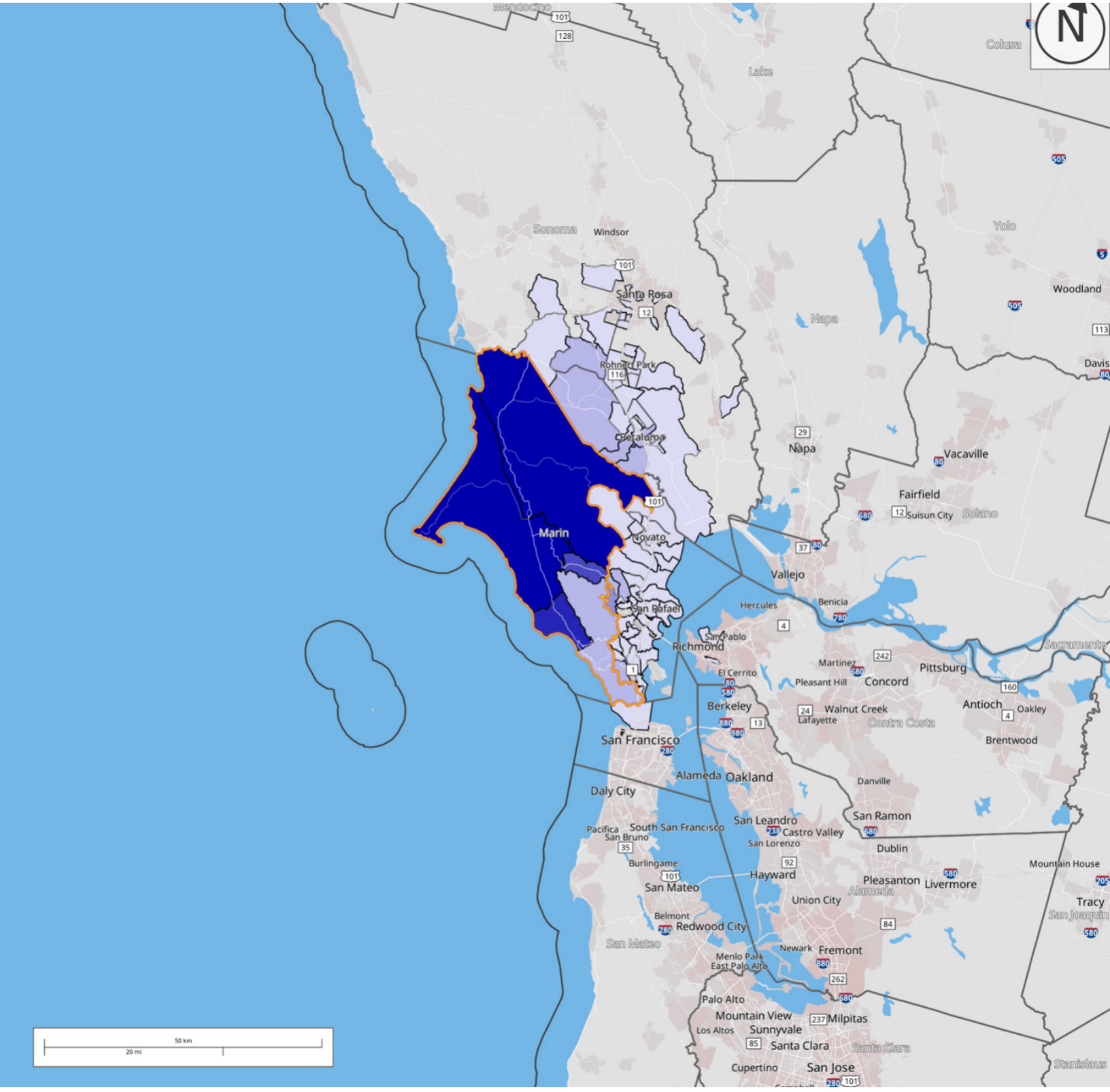
- Net inflows came primarily from Sonoma and Solano.
- Net outflows were primarily to San Francisco, Santa Clara, Alameda, San Mateo, Contra Costa, and Napa counties.

In 2023, the number of outbound commuters from West Marin to areas outside Marin County totaled 2,533 workers, a 2.4% decline over the last decade. The most popular destinations for outbound commuters were San Francisco, Sonoma, Alameda, Contra Costa, and San Mateo counties.

In 2023, the number of inbound commuters to West Marin from areas outside Marin County totaled 2,514 workers, a 25% increase over the last ten years. The most common home counties for inbound commuters were Sonoma, San Francisco, Contra Costa, Alameda, and Solano counties.

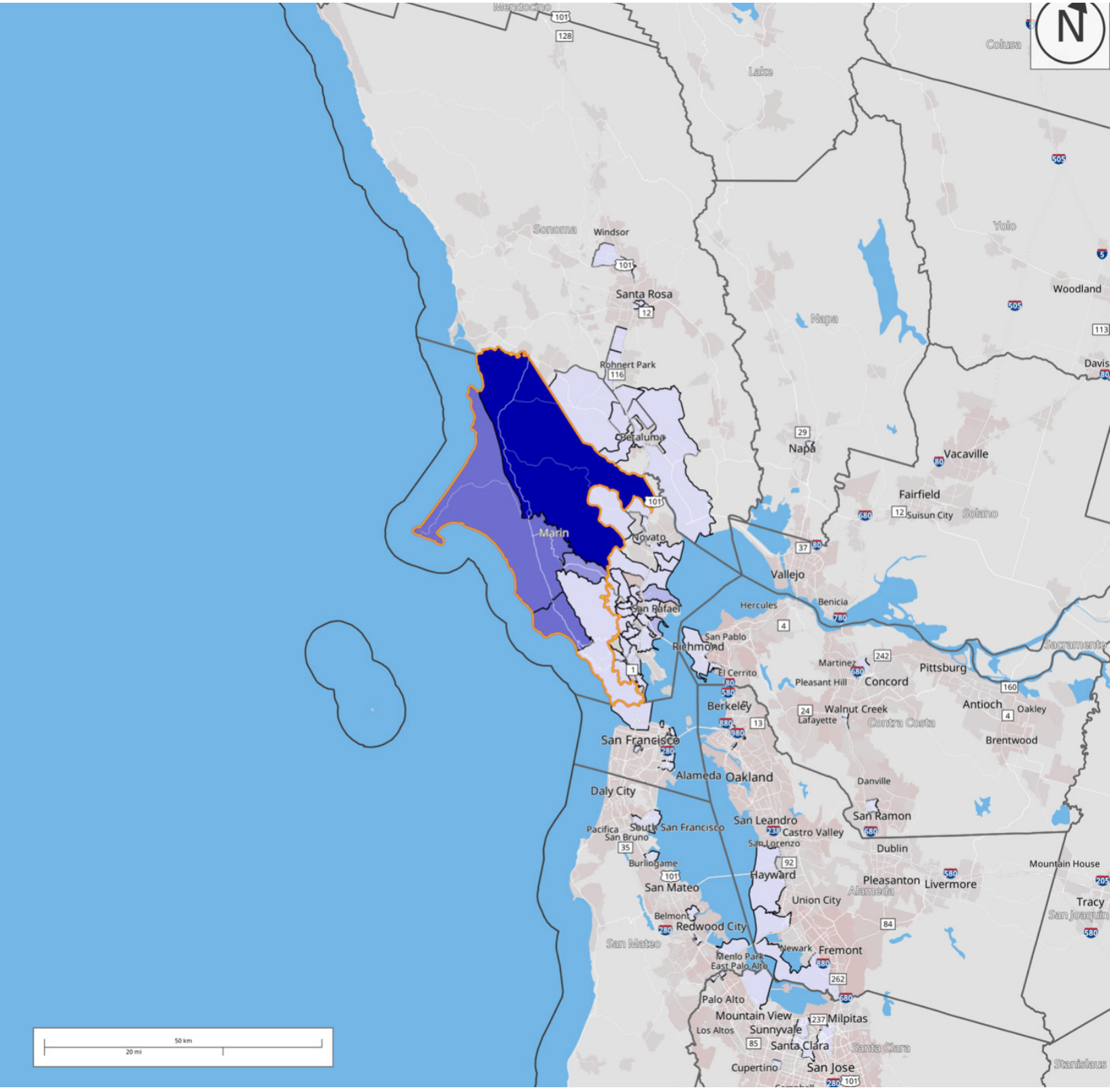
In 2023, the number of West Marin residents who commute within Marin County totaled 1,392 workers, a 36.3% decline from 2013.

Commuting Map for Workers in West Marin[9]



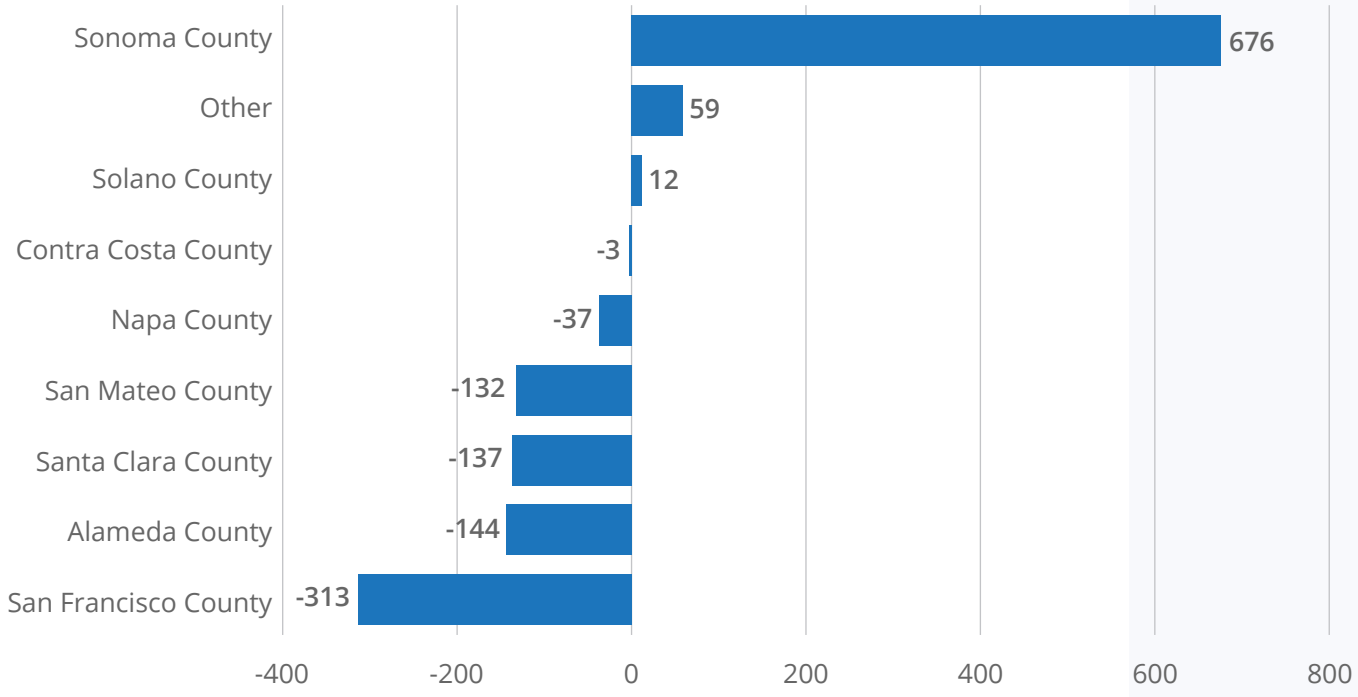
[9] Top 100 Census tracks where West Marin workers live

Commuting Map for Residents of West Marin[10]



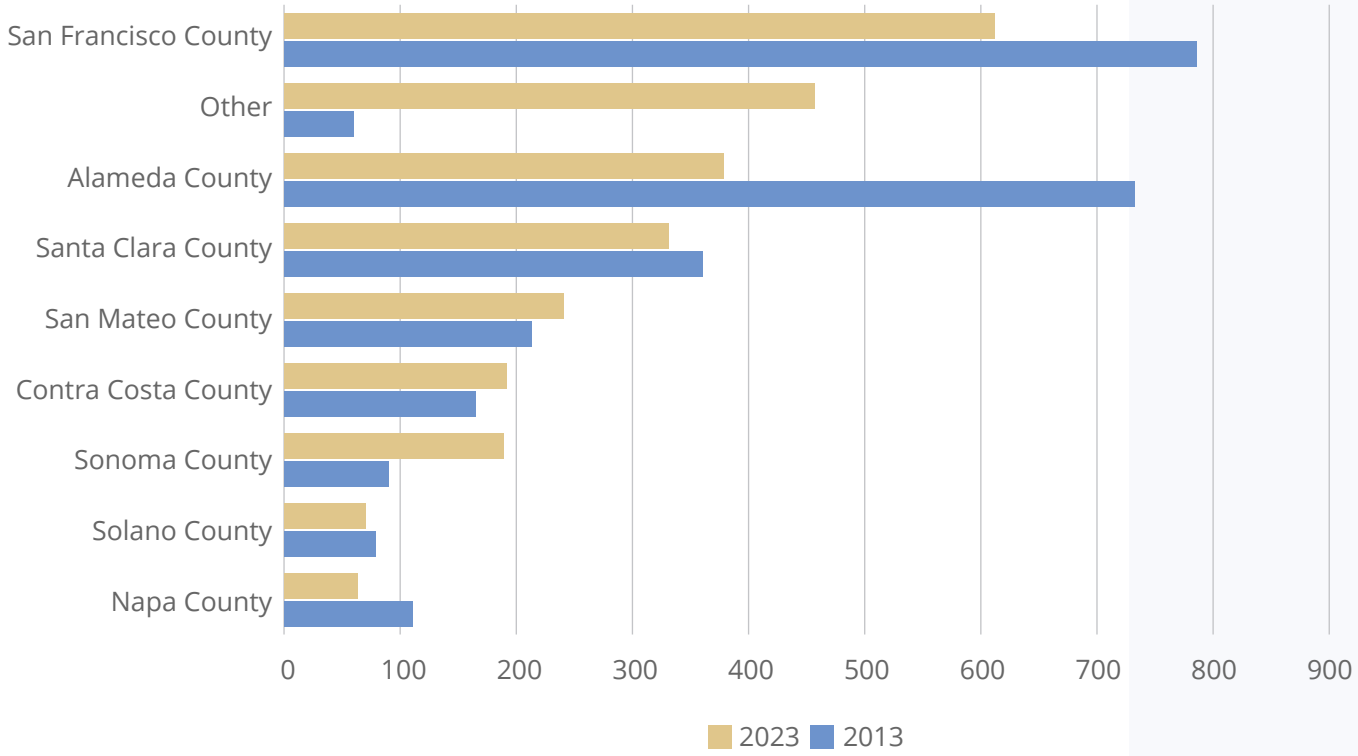
[10] Top 100 Census tracks West Marin residents work

2023 West Marin Net Commuting



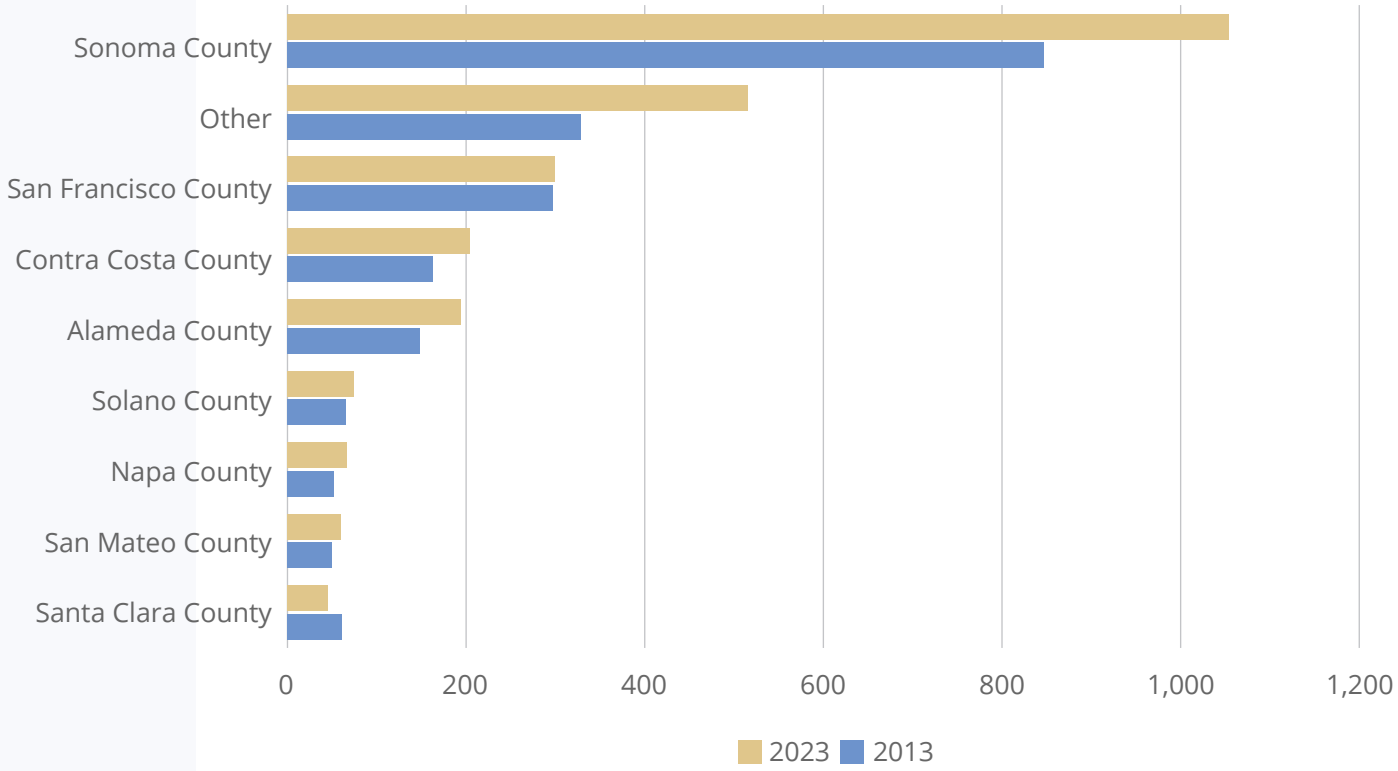
Source: U.S. Census Bureau. Analysis by Beacon Economics.

West Marin Outbound Commuters



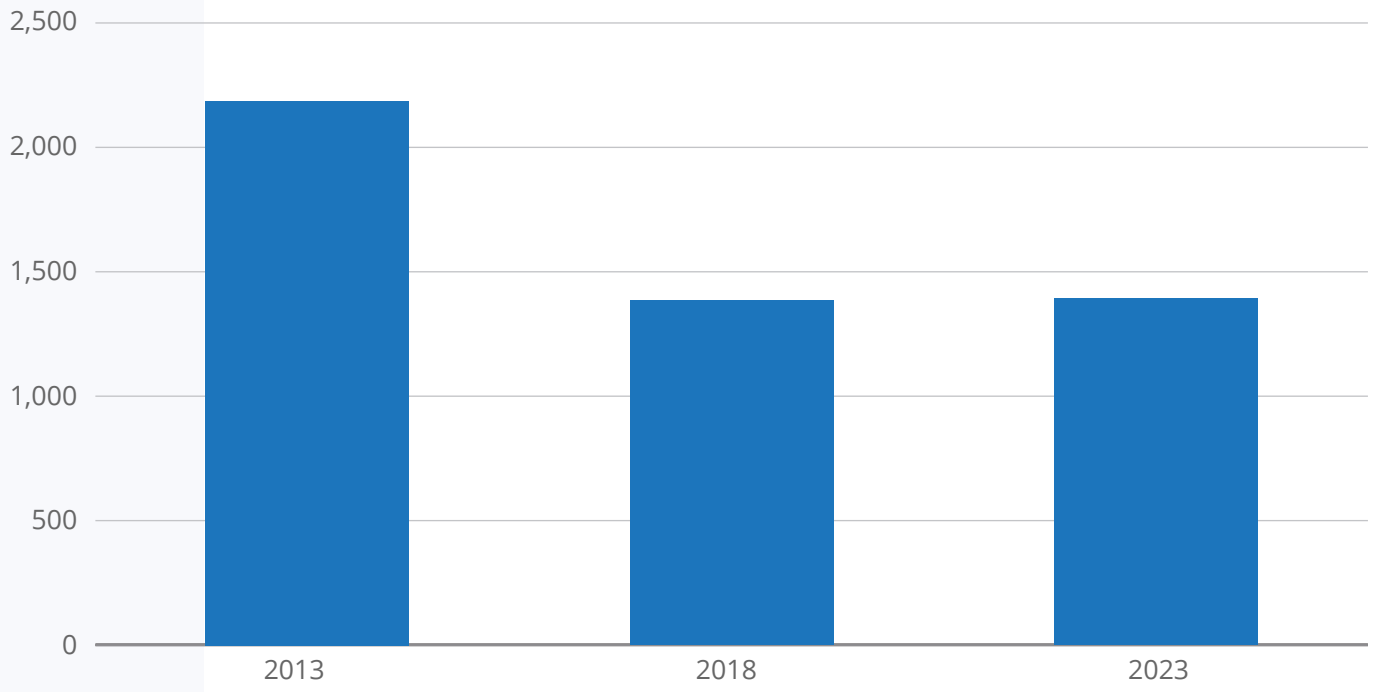
Source: U.S. Census Bureau. Analysis by Beacon Economics.

West Marin Inbound Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.

West Marin Local Commuters



Source: U.S. Census Bureau. Analysis by Beacon Economics.



Marin County Commuter Profile

This section looks at how commuting patterns vary across demographics. It provides details on which populations are commuting into or out of the region, and which populations have jobs in Marin County. This gives insight into which types of jobs need to be filled by populations outside Marin County, and which types of jobs Marin County residents are commuting longer distances for. The demographic profile of commuters in Marin County includes details on:

- Occupation
- Industry
- Age
- Gender
- Race/Ethnicity
- Earnings/Income
- Educational Attainment
- Work-from-Home Trends
- Travel Mode
- Vehicle Availability

Occupation

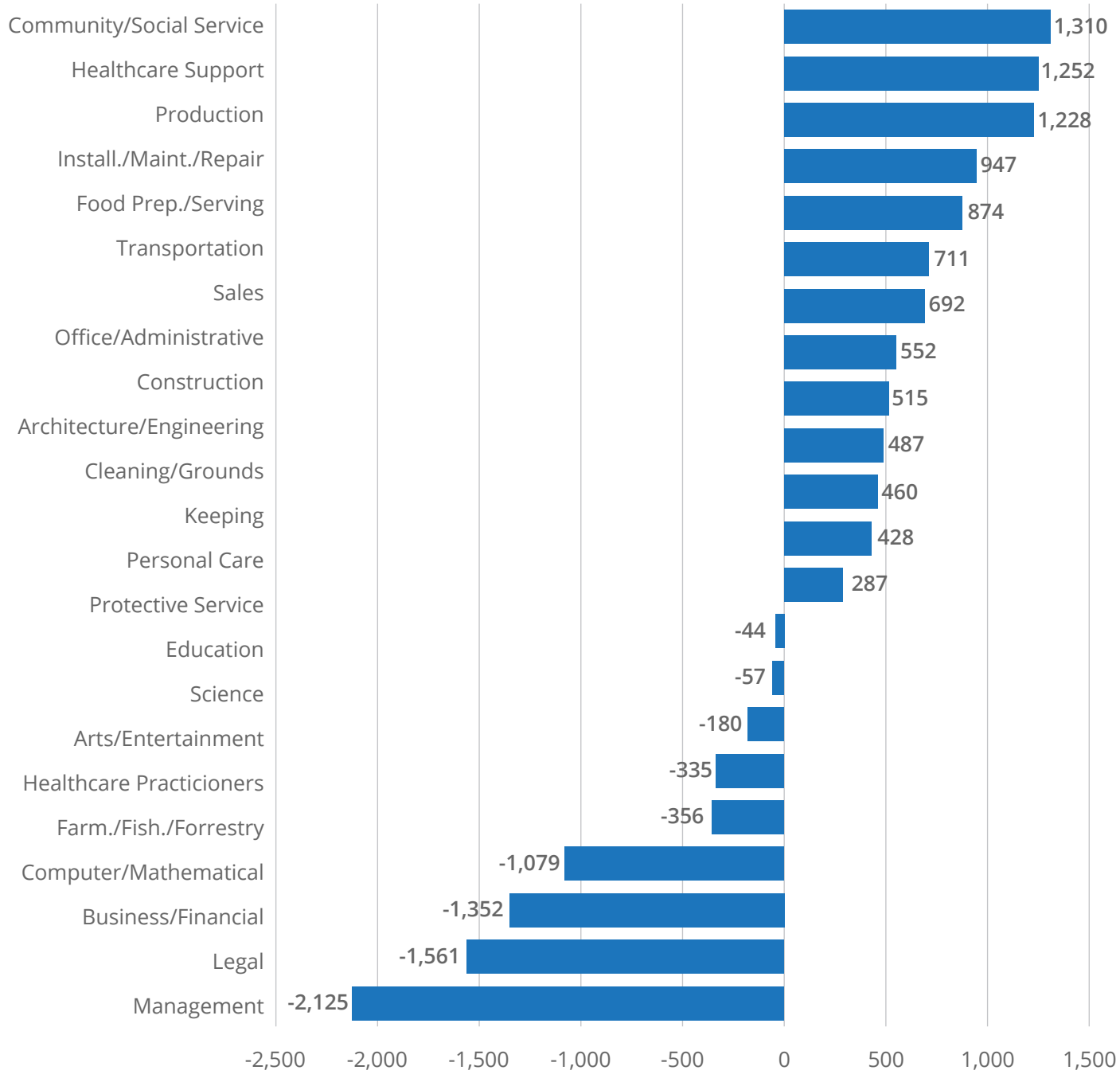
Data from the American Community Survey indicates that in 2024, net inbound commuting was highest for lower-paying occupations in community/social services, healthcare support, and production. Net outbound commuting was highest for higher-paying management, legal, and business and financial positions.

- Management occupations represent the largest number of inbound commuters, accounting for 15.1% of jobs. Other major occupations for inbound commuters were healthcare practitioners, sales, and office and administration. Over the last decade, the fastest-growing sectors for inbound commuters were community/social services (193%), healthcare support (157.3%), and science (143.3%).

- Management occupations represent the largest number of outbound commuters, accounting for 21.8% of jobs. Other major occupations for outbound commuters were healthcare practitioners, business and financial, and education. From 2014 to 2024, the fastest-growing sectors for outbound commuters were healthcare support (603%), personal care (291%), and education (24.6%).

- Management occupations represent the largest number of internal commuters, accounting for 17.1% of jobs. Other major occupations for internal commuters were business and financial, sales, and office and administration. Over the last decade, the fastest-growing sectors for internal commuters have been architecture and engineering (123.4%), computer/mathematical (122.7%), and legal (114%).

2024 Marin County Net Commuters by Industry



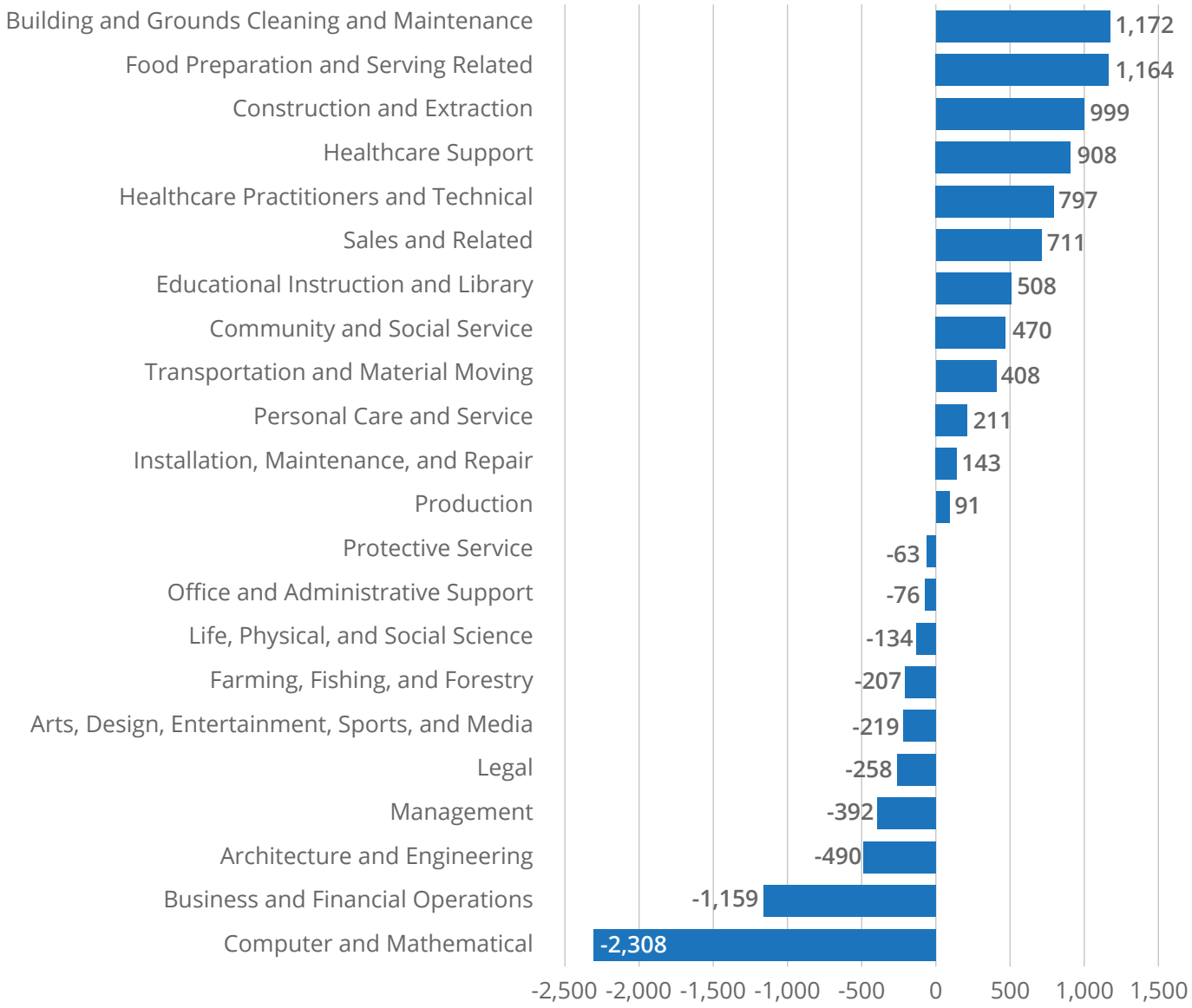
Source: U.S. Census Bureau. Analysis by Beacon Economics.

More recent data by occupation from Lightcast tells a similar story: higher-wage occupations see a net outflow of workers and lower-wage occupations see a net inflow of workers. In total, Marin County saw a net inflow of 4,549 workers in 2025.

- In 2025, net inbound commuting was highest for building and grounds cleaning and maintenance, food preparation and serving related, construction and extraction, healthcare support, and healthcare practitioners.

- Net outbound commuting was highest for computer/mathematical, business and financial operations, architecture and engineering, management, and legal.

2025 Marin County Net Commuters



Source: Lightcast. Analysis by Beacon Economics.

Industry

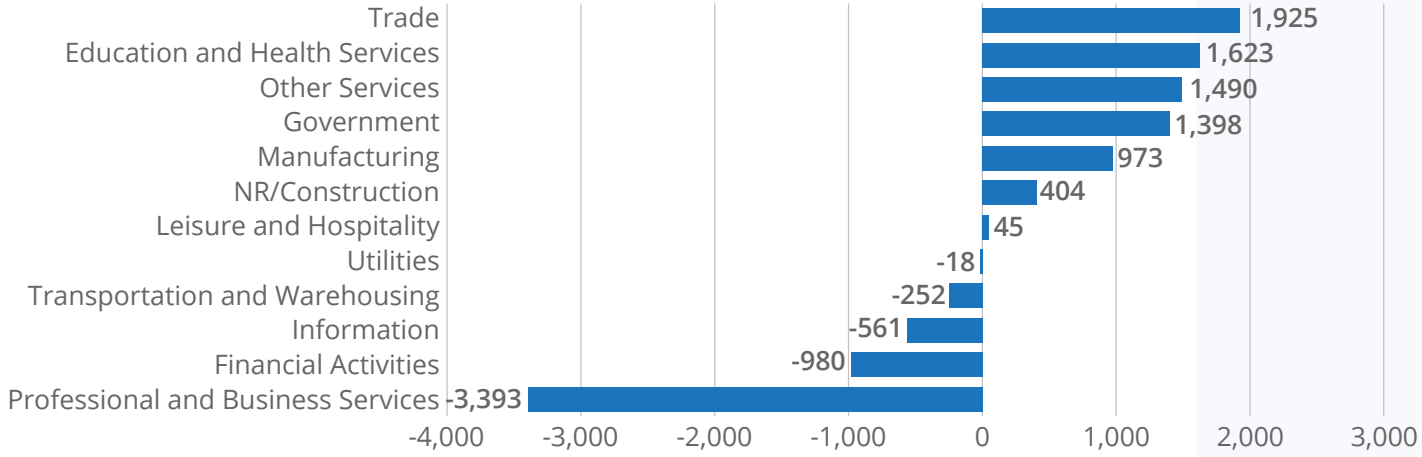
In 2024, net inbound commuting was highest for occupations in trade, education and health services, and other services. Again, these industries are often lower on the pay scale. As a result, workers commute in from lower-cost counties in the surrounding area. In contrast, net outbound commuting is highest for professional and business services, financial activities, and information positions. These industries are often higher on the pay scale.

- Education and health services represents the largest number of inbound commuters, accounting for 23.3% of jobs. Other major industries for inbound commuters were government, trade, and natural resources/construction. Over the last decade, the fastest-growing sectors for inbound commuters were government (38.5%), other services (22.5%), and manufacturing (14.7%).

- Education and health services represents the largest number of outbound commuters, accounting for 20.7% of jobs. Other major industries for outbound commuters were professional and business services, natural resources/construction, and government. From 2014 to 2024, the fastest-growing sectors for outbound commuters were other services (54.9%) and natural resources/construction (20.3%). Over the same period, outbound commuting fell significantly in leisure and hospitality (-55.1%), trade (-53.7%), and information (-41.8%).

- Professional and business services represents the largest number of internal commuters, accounting for 23.5% of jobs. Other major industries for internal commuters were education and health services, financial activities, and trade. Over the last decade, the fastest-growing sectors for internal commuters have been financial activities (44.6%), information (35%%), and professional and business services (21.9%).

2024 Marin County Net Commuters by Industry

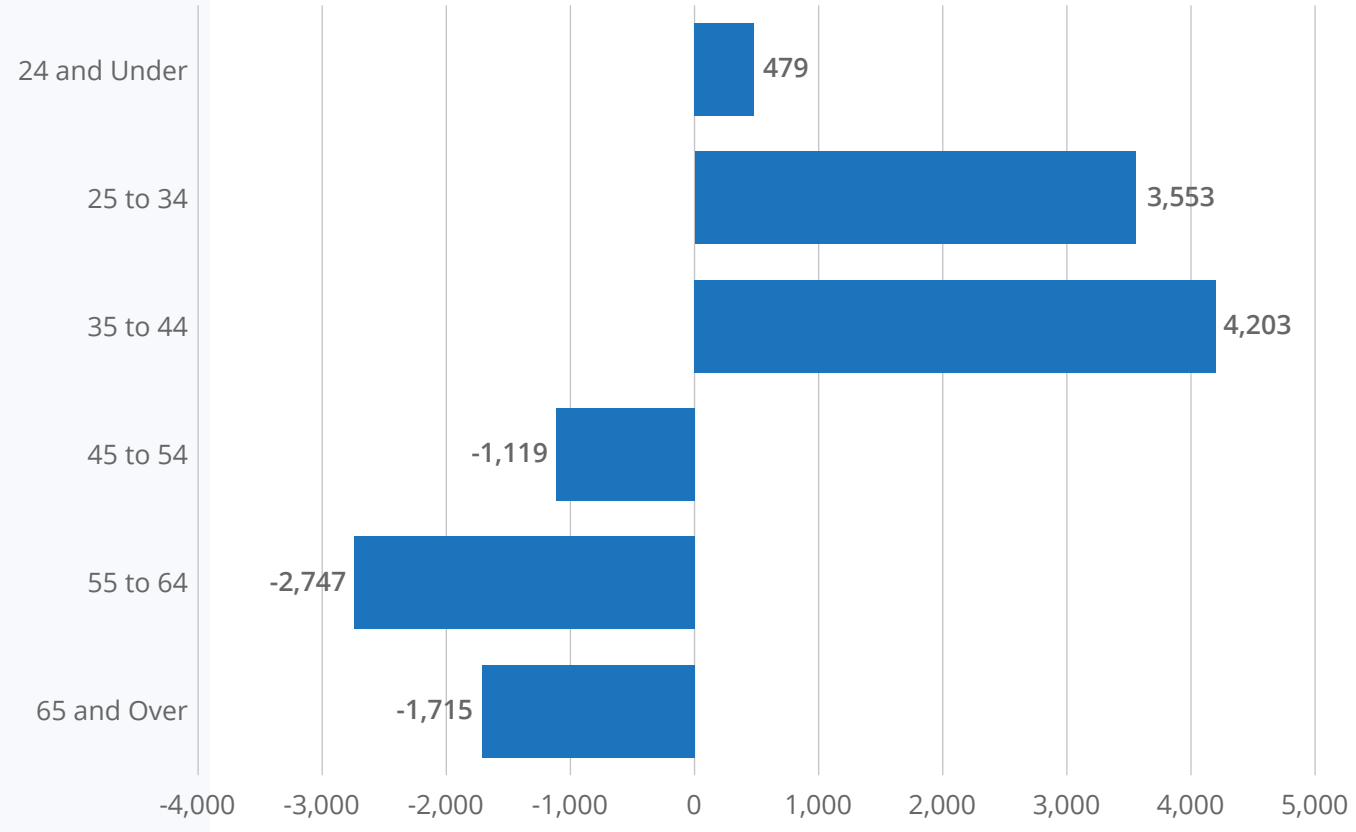


Source: American Community Survey. Analysis by Beacon Economics.

Age

In 2024, net inbound commuting was highest for younger workers, with workers 35 to 44 (+4,203), 25 to 34 (+3,553), and 24 and under (+479) all seeing positive net inbound commuting. These workers have not yet entered their highest earning years, and because of the high cost of housing in the region, have had to look for more affordable housing in nearby counties. In contrast, net outbound commuting is highest among older workers, with those 45 to 54 (-1,119), 55 to 64 (-2,747), and 65 and over (-1,715) all showing net outbound commuting from Marin County. These workers are in their highest earning years and/or were able to enter the housing market when homes were more affordable compared to the current market conditions.

2024 Marin County Net Commuters Age



Source: American Community Survey. Analysis by Beacon Economics.

Number of Commuters by Type and Age Group

Age Group	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Local					
Total	**83,261**	**85,806**	**91,854**	**7.0**	**10.3**
24 and Under	8,022	11,065	11,148	0.8	39.0
25 to 34	10,692	11,185	13,285	18.8	24.3
35 to 44	14,140	14,608	16,846	15.3	19.1
45 to 54	21,707	21,445	21,308	-0.6	-1.8
55 to 64	17,422	17,111	17,043	-0.4	-2.2
65 and Over	11,278	10,392	12,224	17.6	8.4
Inbound					
Total	**49,384**	**39,704**	**40,565**	**2.2**	**-17.9**
24 and Under	4,793	3,990	2,716	-31.9	-43.3
25 to 34	11,017	9,754	9,843	0.9	-10.7
35 to 44	10,930	9,201	11,694	27.1	7.0
45 to 54	11,787	7,145	7,737	8.3	-34.4
55 to 64	8,630	7,028	5,857	-16.7	-32.1
65 and Over	2,227	2,586	2,718	5.1	22.0
Outbound					
Total	**51,595**	**44,263**	**37,911**	**-14.4**	**-26.5**
24 and Under	3,299	2,432	2,237	-8.0	-32.2
25 to 34	6,335	6,043	6,290	4.1	-0.7
35 to 44	12,906	8,293	7,491	-9.7	-42.0
45 to 54	12,439	12,242	8,856	-27.7	-28.8
55 to 64	11,306	9,913	8,604	-13.2	-23.9
65 and Over	5,310	5,340	4,433	-17.0	-16.5

Source: American Community Survey. Analysis by Beacon Economics.

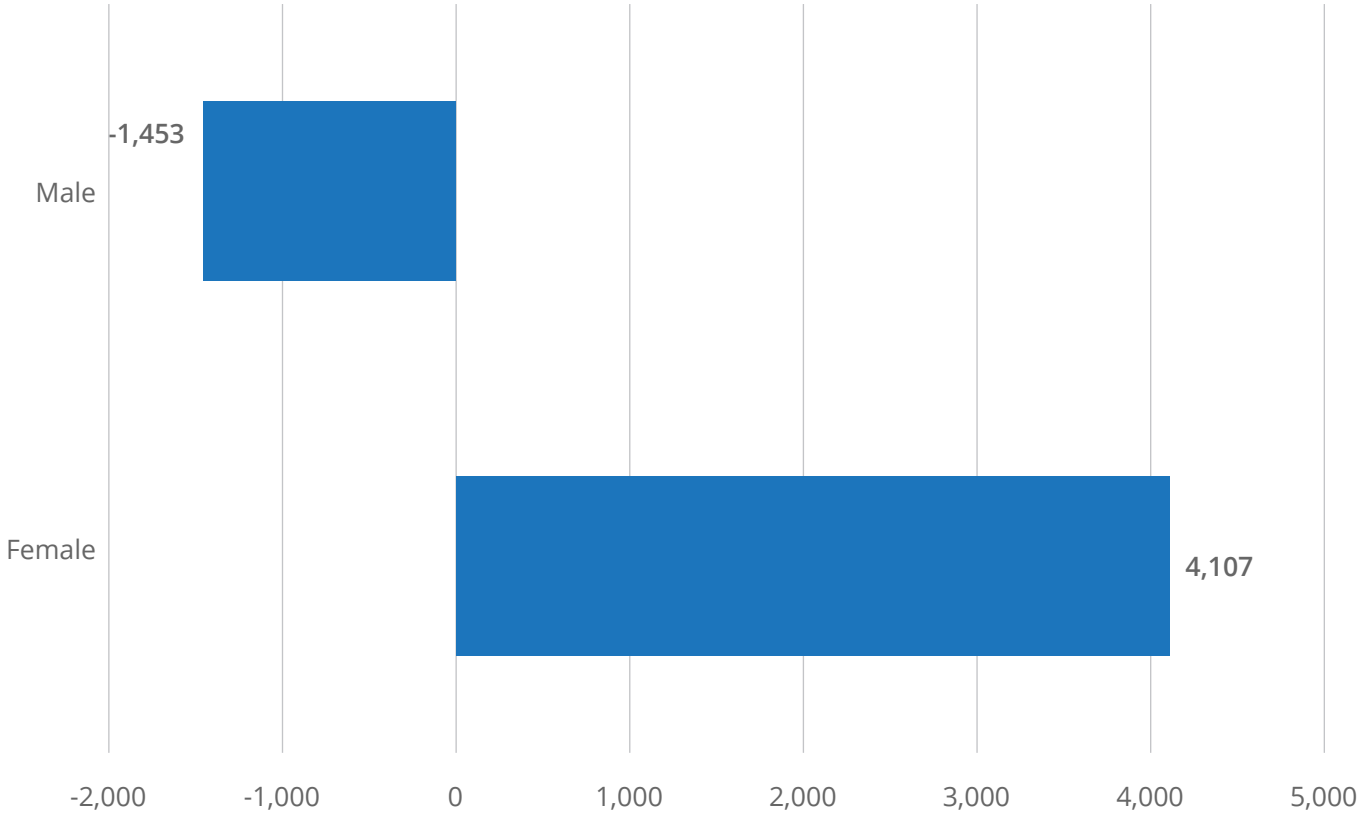
Gender

In 2024, net inbound commuting was highest among females at 4,107 workers. In contrast, males saw a net outflow of 1,453 workers.

Over the last decade, inbound commuting has fallen by 10.4% for females and by 23.5% for males.

- From 2014 to 2024, outbound commuting has fallen by 30.5% for females and by 23.6% for males.
- Over the same period, internal commuting has risen by 10.6% for females and by 10.0% for males.

2024 Marin County Net Commuters by Sex



Source: American Community Survey. Analysis by Beacon Economics.

Number of Commuters by Type and Sex

Age Group	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Local					
Total	**83,261**	**85,806**	**91,854**	**7.0**	**10.3**
Female	42,156	43,029	46,629	8.4	10.6
Male	41,105	42,777	45,225	5.7	10.0
Inbound					
Total	49,384	39,704	40,565	2.2	-17.9
Female	21,243	16,989	19,043	12.1	-10.4
Male	28,141	22,715	21,522	-5.3	-23.5
Outbound					
Total	**51,595**	**44,263**	**37,911**	**-14.4**	**-26.5**
Female	21,506	18,756	14,936	-20.4	-30.5
Male	30,089	25,507	22,975	-9.9	-23.6

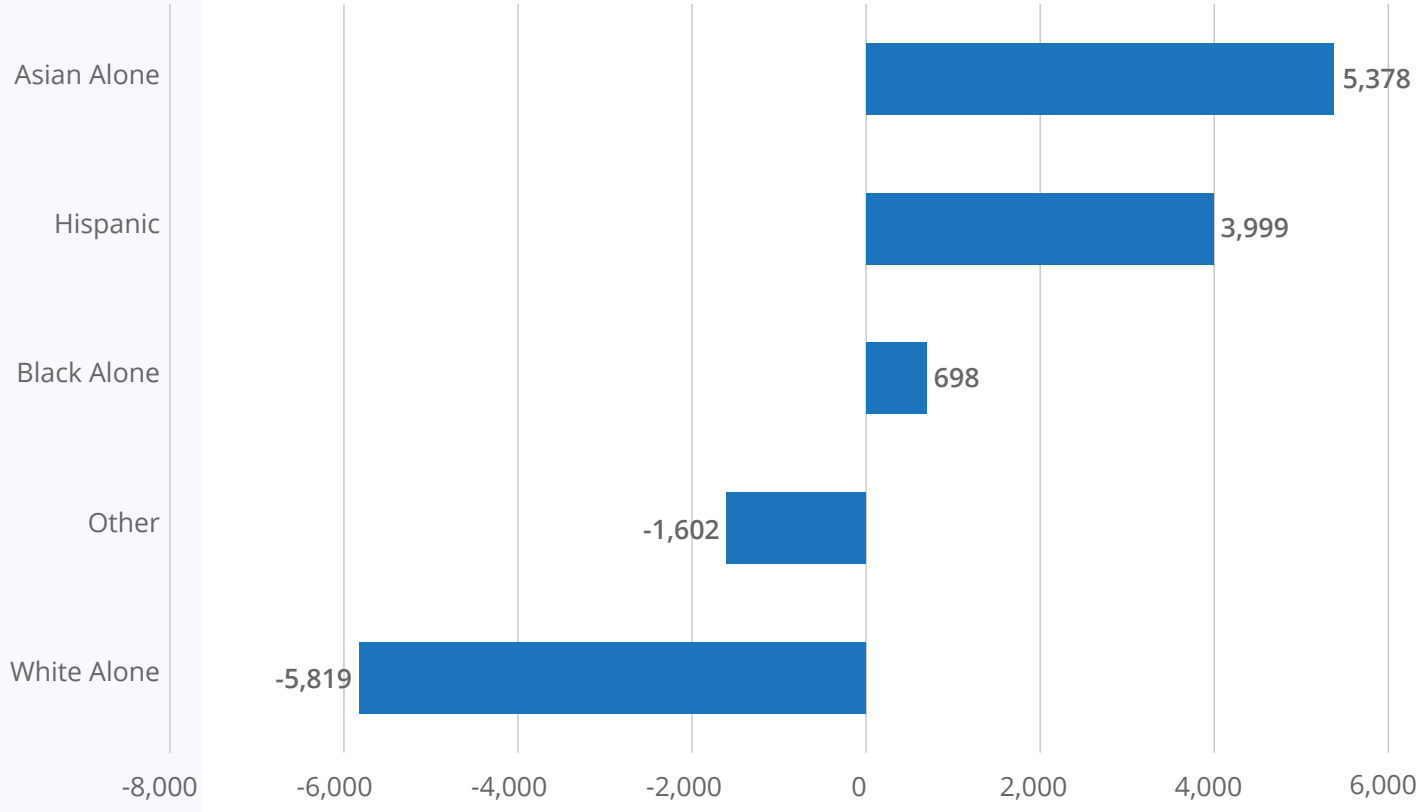
Source: American Community Survey. Analysis by Beacon Economics.

Race and Ethnicity

In 2024, net inbound commuting was higher for non-white populations, with Asian alone (+5,378), Hispanic (+3,999), and Black alone (+698) all seeing positive net inbound commuting. In contrast, net outbound commuting is highest among White workers, with White alone (-5,819) and Other (-1,602) all seeing net outbound commuting from Marin County.

- From 2014 to 2024, outbound commuting has fallen for White alone (-41.1%) and Asian alone (-36.8%). In contrast, it has risen for Hispanics (71.5%)
- Over the same period, inbound commuting has fallen for White alone (-20.9%) and Hispanics (-14.2%)
- Internal commuting rose for Hispanics (11.5%) and Asian alone (15.2%) but fell for White alone (-1.3%).

2024 Marin County Net Commuters by Race/Ethnicity



Source: American Community Survey. Analysis by Beacon Economics.

Number of Commuters by Type and Race/Ethnicity

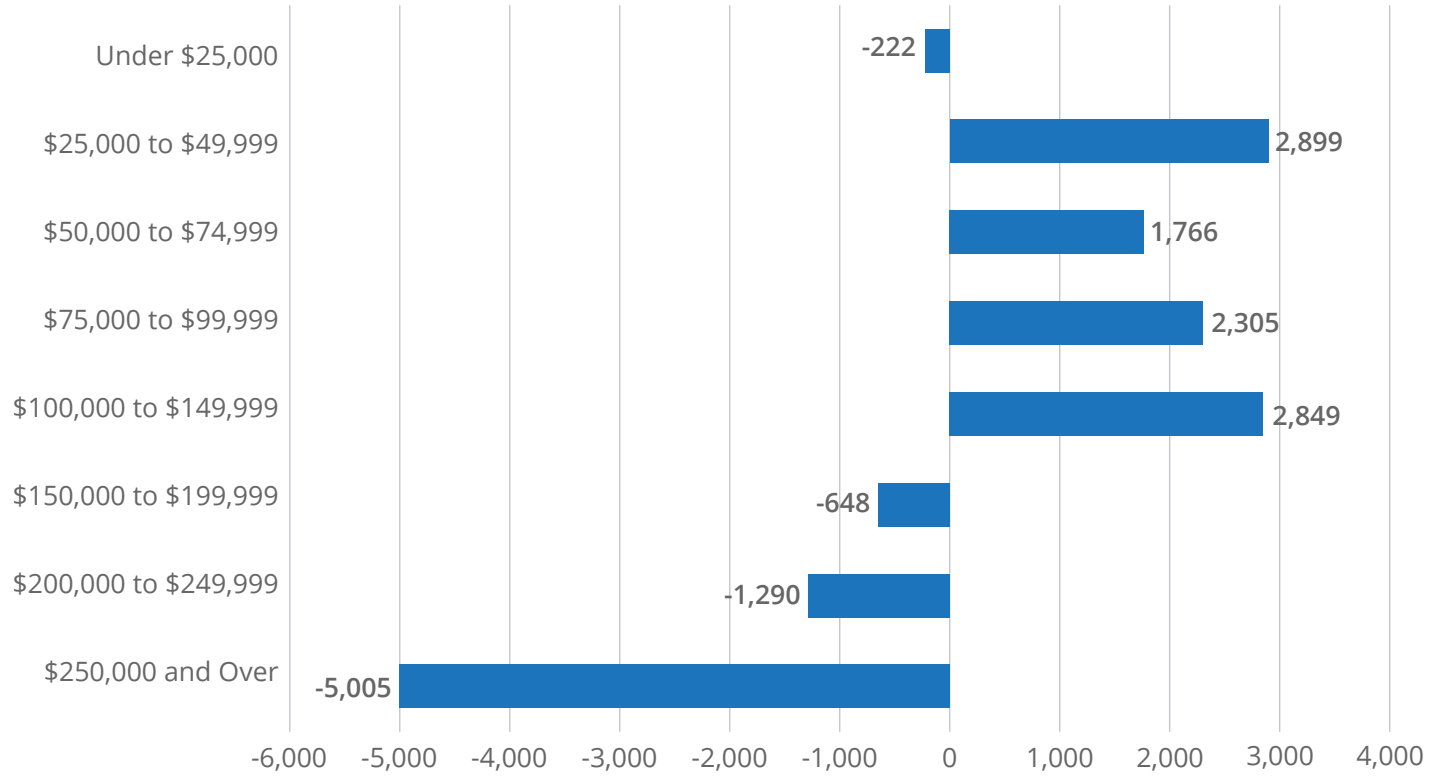
Race/ Ethnicity	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Local					
Total	**83,261**	**85,806**	**91,854**	**7.0**	**10.3**
Asian Alone	5,681	6,000	6,547	9.1	15.2
Black Alone	1,390	1,888	1,324	-29.9	-4.7
Hispanic	16,223	16,979	18,089	6.5	11.5
Other	2,139	2,931	8,821	201.0	312.4
White Alone	57,828	58,008	57,073	-1.6	-1.3
Inbound					
Total	**49,384**	**39,704**	**40,565**	**2.2**	**-17.9**
Asian Alone	7,079	5,586	8,016	43.5	13.2
Black Alone	3,283	2,236	1,182	-47.1	-64.0
Hispanic	12,977	11,843	11,139	-5.9	-14.2
Other	2,550	1,071	1,648	53.9	-35.4
White Alone	23,495	18,968	18,580	-2.0	-20.9
Outbound					
Total	**51,595**	**44,263**	**37,911**	**-14.4**	**-26.5**
Asian Alone	4,175	3,087	2,638	-14.5	-36.8
Black Alone	633	727	484	-33.4	-23.5
Hispanic	4,163	5,271	7,140	35.5	71.5
Other	1,220	527	3,250	516.7	166.4
White Alone	41,404	34,651	24,399	-29.6	-41.1

Source: American Community Survey. Analysis by Beacon Economics.

Income Groups

In 2024, net inbound commuting was highest for lower earners. Workers earning between $25,000 and $99,999 also saw positive net inbound commuting to Marin County in 2024. In contrast, net outbound commuting is highest for those earning $250,000 or more (-5,005), followed by those earning between $200,000 and$249,999 (-1,290), and $150,000 to $199,999. Workers earning less than $25,000 also saw outbound migration.

2024 Marin County Net Commuters by Income



Source: American Community Survey. Analysis by Beacon Economics.

Number of Commuters by Type and Annual Earnings

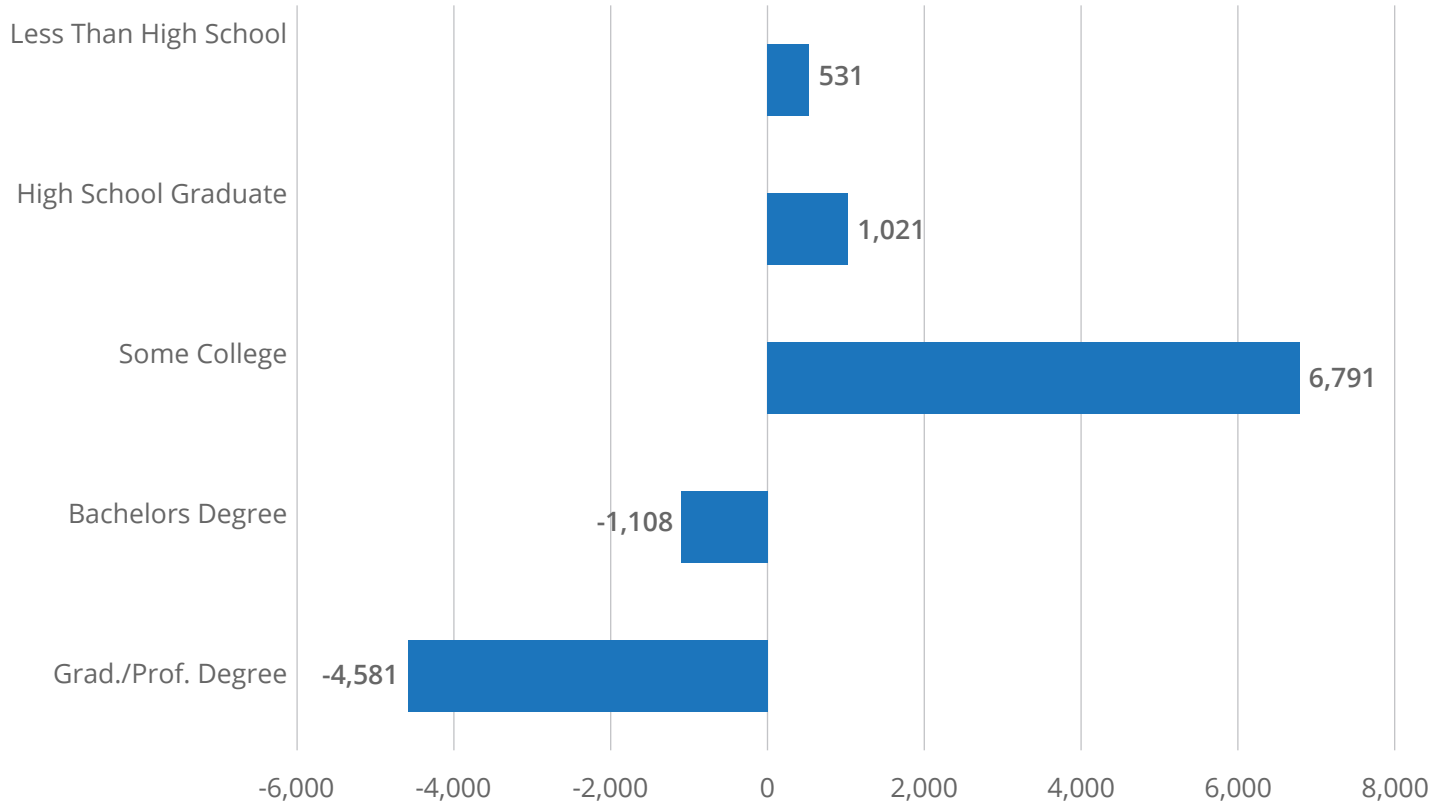
Race/Ethnicity	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Local					
Total	**83,261**	**85,806**	**91,854**	**7.0**	**10.3**
Under $25,000	36,789	32,686	30,410	-7.0	-17.3
$25,000 to $49,999	16,809	17,689	12,494	-29.4	-25.7
$50,000 to $74,999	11,174	9,282	11,158	20.2	-0.1
$75,000 to $99,999	6,293	9,237	6,565	-28.9	4.3
$100,000 to $149,999	5,639	7,374	10,835	46.9	92.1
$150,000 to $199,999	1,545	4,232	5,323	25.8	244.5
$200,000 to $249,999	2,207	1,577	4,679	196.7	112.0
$250,000 and Over	2,805	3,729	10,390	178.6	270.4
Inbound					
Total	49,384	39,704	40,565	2.2	-17.9
Under $25,000	16,424	8,981	6,380	-29.0	-61.2
$25,000 to $49,999	12,011	9,485	7,050	-25.7	-41.3
$50,000 to $74,999	9,749	8,367	6,882	-17.7	-29.4
$75,000 to $99,999	4,001	4,922	5,744	16.7	43.6
$100,000 to $149,999	4,835	4,981	6,911	38.7	42.9
$150,000 to $199,999	1,502	1,773	3,438	93.9	128.9
$200,000 to $249,999	401	333	1,900	470.6	373.8
$250,000 and Over	461	862	2,260	162.2	390.2
Outbound					
Total	**51,595**	**44,263**	**37,911**	**-14.4**	**-26.5**
Under $25,000	12,160	7,878	6,602	-16.2	-45.7
$25,000 to $49,999	8,288	4,986	4,151	-16.7	-49.9
$50,000 to $74,999	5,593	4,808	5,116	6.4	-8.5
$75,000 to $99,999	5,319	4,185	3,439	-17.8	-35.3
$100,000 to $149,999	9,634	8,773	4,062	-53.7	-57.8
$150,000 to $199,999	4,570	4,501	4,086	-9.2	-10.6
$200,000 to $249,999	1,823	2,823	3,190	13.0	75.0
$250,000 and Over	4,208	6,309	7,265	15.2	72.6

Source: American Community Survey. Analysis by Beacon Economics.

Educational Attainment

Educational Attainment follows the same pattern as earnings. Marin County has a net inflow of workers with lower levels of education and a net outflow of workers with higher levels of education. In 2024, there was a net inflow of workers with some college (+6,791), high school diploma (+1,021), and less than high school (+531). At the same time, there was a net outflow of workers with a bachelor's (-1,108), graduate or professional degree (-4,581). The types of jobs that command higher wages also require higher levels of education.

2024 Marin County Net Commuters by Educational Attainment



Source: American Community Survey. Analysis by Beacon Economics.

Number of Commuters by Type and Educational Attainment

Educational Attainment	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Local					
Total	**83,261**	**85,806**	**91,854**	**7.0**	**10.3**
Less Than High School	7,712	10,276	8,001	-22.1	3.7
High School Graduate	11,250	10,575	10,991	3.9	-2.3
Some College	24,521	20,699	17,083	-17.5	-30.3
Bachelor's Degree	21,401	27,971	33,734	20.6	57.6
Grad/Prof Degree	18,377	16,285	22,045	35.4	20.0
Inbound					
Total	49,384	39,704	40,565	2.2	-17.9
Less Than High School	5,194	2,662	3,533	32.7	-32.0
High School Graduate	7,074	9,217	4,514	-51.0	-36.2
Some College	17,661	12,135	13,179	8.6	-25.4
Bachelor's Degree	11,690	10,329	12,389	19.9	6.0
Grad/Prof Degree	7,765	5,361	6,950	29.6	-10.5
Outbound					
Total	**51,595**	**44,263**	**37,911**	**-14.4**	**-26.5**
Less Than High School	1,249	1,137	3,002	164.0	140.4
High School Graduate	5,832	4,051	3,493	-13.8	-40.1
Some College	9,506	6,008	6,388	6.3	-32.8
Bachelor's Degree	17,783	19,949	13,497	-32.3	-24.1
Grad/Prof Degree	17,225	13,118	11,531	-12.1	-33.1

Source: American Community Survey. Analysis by Beacon Economics.

Mode of Transportation and Vehicle Availability

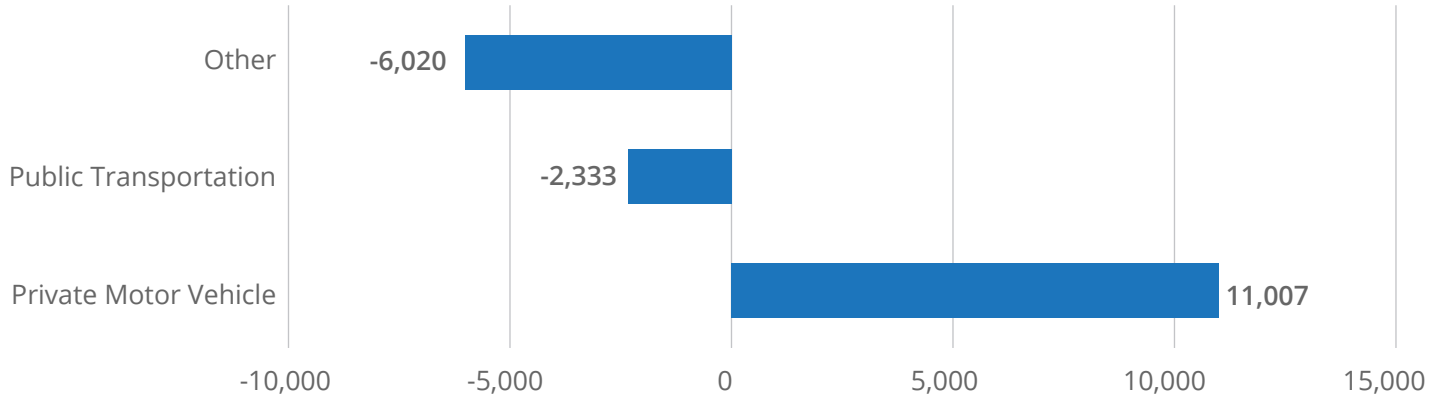
The growth in work-from-home and hybrid schedules has changed commuting patterns in Marin County. While the LEHD data used earlier cannot identify workers who work from home, the ACS provides insight into how work-from-home has changed over the past decade. In 2024, an estimated 32,424 workers worked from home, an increase of more than 160% from 2014. Over the same period, the number of Marin County residents commuting by private motor vehicle fell by 22.5%. Public transportation use also declined significantly, with the number of residents commuting by public transportation falling by 38.3%.

Numbers of Commuters by Type and Mode of Transportation

Mode of Transportation	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Local					
Worked from Home	12,442	17,738	32,424	82.8	160.6
Private Motor Vehicle	63,314	58,197	50,138	-13.8	-20.8
Public Transportation	2,383	3,656	4,252	16.3	78.4
Other	5,122	6,215	5,040	-18.9	-1.6
Inbound					
Private Motor Vehicle	47,132	37,747	38,816	2.8	-17.6
Public Transportation	1,274	1,052	1,187	12.8	-6.8
Other	978	905	562	-37.9	-42.5
Outbound					
Private Motor Vehicle	37,277	29,983	27,809	-7.3	-25.4
Public Transportation	10,231	11,068	3,520	-68.2	-65.6
Other	4,087	3,212	6,582	104.9	61.0

Source: American Community Survey. Analysis by Beacon Economics.

2024 Marin County Net Commuters by Mode of Transportation



Source: American Community Survey. Analysis by Beacon Economics.

Vehicle availability in Marin County is similar to the United States and California. In Marin County, just 4% of working households do not have a vehicle, compared to 5.6% in the United States and 4.6% in California.

Number of Vehicles per Household

Households with Workers	United States	California	Marin County
No vehicle available	5.6%	4.6%	4.0%
1 vehicle available	28.7%	26.5%	27.3%
2 vehicles available	39.3%	38.6%	41.7%
3 vehicles available	17.0%	18.4%	20.4%
4 or more vehicles available	9.4%	11.9%	6.6%

Source: American Community Survey. Analysis by Beacon Economics.

While commute times have fallen for inbound and outbound commuters over the last decade, they have increased for residents who both live and work in Marin County. In 2024, the average commute for local commuters was 22.4 minutes, up 16.6% from 2014. By comparison, the average commute was 42.4 minutes for outbound commuters and 43.0 minutes for inbound commuters, with both declining over the same period.

Average Commute Time by Type of Commuter

Type of Commuter	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Local	19.2	21.6	22.4	3.7	16.6
Inbound	44.5	50.2	43.0	-14.3	-3.3
Outbound	49.1	51.3	42.4	-17.4	-13.6

Source: American Community Survey. Analysis by Beacon Economics.



Conclusion

The housing constraints in Marin play a central role in the county's commuting patterns. Marin County draws in a significant number of lower-wage workers from surrounding areas, workers who are unable to afford the high cost of housing in the region. In contrast, Marin sees a significant number of high-earning workers commute to areas like San Francisco. These workers can afford the region's high housing costs. The county has added very little housing capacity since the Great Recession, and rising incomes have allowed smaller and more affluent households to occupy this limited housing. As a result, the number of households is at an all-time high despite recent population declines.

A lack of housing production has caused employers to rely more heavily on workers who do not live in the county than they did two decades ago. This is important for development because employers' reliance on workers from outside the county could make labor availability a constraint on business retention and growth. While work-from-home has helped offset some of these trends, it has not substantively changed the mismatch between the region's cost of living and the earnings of its lower-wage workers.

This mismatch is an issue throughout the Bay Area. More housing will be necessary to help sustain local job growth in the years to come. Without a significant increase in new residential construction, there will not be enough housing stock to support the region's workforce. Construction would also ease the strain on the region's infrastructure caused by commuting, reducing commute times and improving quality of life for Bay Area residents and workers.

Appendix

Occupation Tables

Number of Local Commuters by Occupation

Occupation	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Total	83,261	85,806	91,854	7.0	10.3
Management	10,617	14,115	15,749	11.6	48.3
Business/Financial	6,262	6,251	8,523	36.3	36.1
Sales	10,582	11,000	8,475	-23.0	-19.9
Office/Administrative	10,045	6,094	7,325	20.2	-27.1
Education	4,901	5,796	5,997	3.5	22.4
Arts/Entertainment	4,387	4,506	5,818	29.1	32.6
Cleaning/Groundskeeping	4,349	3,116	4,766	53.0	9.6
Food Prep./Serving	3,373	5,368	4,392	-18.2	30.2
Computer/Mathematical	1,764	1,672	3,929	135.0	122.7
Healthcare Practitioners	3,667	4,485	3,905	-12.9	6.5
Personal Care	4,770	3,257	3,552	9.1	-25.5
Construction	4,205	4,401	3,456	-21.5	-17.8
Legal	1,303	1,311	2,788	112.7	114.0
Transportation	2,925	4,795	2,259	-52.9	-22.8
Community/Social Service	1,053	1,298	2,025	56.0	92.3
Healthcare Support	1,350	3,043	1,968	-35.3	45.8
Science	837	1,229	1,870	52.2	123.4
Architecture/Engineering	991	1,080	1,569	45.3	58.3
Production	1,390	832	1,038	24.8	-25.3
Protective Service	1,143	1,350	934	-30.8	-18.3
Install./Maint./Repair	2,403	733	895	22.1	-62.8
Farm./Fish./Forestry	944	74	621	739.2	-34.2

Source: American Community Survey. Analysis by Beacon Economics.

Number of Inbound Commuters by Occupation

Occupation	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Total	49,384	39,704	40,565	2.2	-17.9
Management	6,100	5,087	6,131	20.5	0.5
Healthcare Practitioners	3,633	1,486	3,670	147.0	1.0
Sales	5,726	3,707	2,686	-27.5	-53.1
Office/Administrative	5,386	4,084	2,648	-35.2	-50.8
Construction	4,148	2,974	2,580	-13.2	-37.8
Healthcare Support	902	1,186	2,321	95.7	157.3
Education	2,489	1,110	2,291	106.4	-8.0
Business/Financial	2,798	2,429	1,891	-22.1	-32.4
Production	1,150	1,935	1,770	-8.5	53.9
Transportation	2,733	2,188	1,692	-22.7	-38.1
Community/Social Service	575	527	1,685	219.7	193.0
Food Prep./Serving	2,741	1,670	1,633	-2.2	-40.4
Install./Maint./Repair	1,738	405	1,459	260.2	-16.1
Personal Care	1,952	1,865	1,429	-23.4	-26.8
Protective Service	902	1,907	1,288	-32.5	42.8
Cleaning/Groundskeeping	2,391	1,524	1,202	-21.1	-49.7
Science	420	864	1,022	18.3	143.3
Computer/Mathematical	1,095	1,979	918	-53.6	-16.2
Arts/Entertainment	1,262	1,852	902	-51.3	-28.5
Architecture/Engineering	635	651	845	29.8	33.1
Legal	608	267	364	36.3	-40.1

Source: American Community Survey. Analysis by Beacon Economics.

Number of Outbound Commuters by Occupation

Occupation	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Total	51,595	44,263	37,911	-14.4	-26.5
Management	10,203	11,313	8,256	-27.0	-19.1
Healthcare Practitioners	4,615	3,017	4,005	32.7	-13.2
Business/Financial	4,747	2,809	3,243	15.5	-31.7
Education	1,874	1,906	2,335	22.5	24.6
Office/Administrative	3,390	1,875	2,096	11.8	-38.2
Construction	2,423	1,805	2,065	14.4	-14.8
Computer/Mathematical	2,480	2,477	1,997	-19.4	-19.5
Sales	6,793	6,234	1,994	-68.0	-70.6
Legal	2,024	2,146	1,925	-10.3	-4.9
Arts/Entertainment	2,523	2,014	1,082	-46.3	-57.1
Science	1,635	903	1,079	19.5	-34.0
Healthcare Support	152	207	1,069	416.4	603.3
Personal Care	256	727	1,001	37.7	291.0
Protective Service	1,473	452	1,001	121.5	-32.0
Transportation	1,485	790	981	24.2	-33.9
Food Prep./Serving	964	1,359	759	-44.2	-21.3
Cleaning/Groundskeeping	719	865	742	-14.2	3.2
Production	623	957	542	-43.4	-13.0
Install./Maint./Repair	1,198	558	512	-8.2	-57.3
Farm./Fish./Forestry	0	50	494	888.0	*
Community/Social Service	959	617	375	-39.2	-60.9
Architecture/Engineering	1,059	1,182	358	-69.7	-66.2

Source: American Community Survey. Analysis by Beacon Economics.

Number of Local Commuters by Industry

Industry	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Total	83,261	85,806	91,854	7.0	10.3
Professional and Business Services	17,682	15,259	21,546	41.2	21.9
Education and Health Services	14,634	13,864	16,145	16.5	10.3
Financial Activities	7,145	7,068	10,331	46.2	44.6
Trade	10,161	12,466	9,696	-22.2	-4.6
Leisure and Hospitality	7,063	8,908	8,281	-7.0	17.2
NR/Construction	6,124	7,170	6,611	-7.8	8.0
Government	5,478	6,427	6,455	0.4	17.8
Other Services	7,044	6,087	5,522	-9.3	-21.6
Manufacturing	3,657	4,863	2,996	-38.4	-18.1
Information	1,779	1,898	2,402	26.6	35.0
Transportation and Warehousing	1,995	1,406	1,829	30.1	-8.3
Utilities	499	390	40	-89.7	-92.0

Source: American Community Survey. Analysis by Beacon Economics.

Number of Inbound Commuters by Industry

Industry	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Total	49,384	39,704	40,565	2.2	-17.9
Education and Health Services	9,294	5,290	9,452	78.7	1.7
Government	3,950	3,228	5,472	69.5	38.5
Trade	8,146	5,968	4,729	-20.8	-41.9
NR/Construction	4,980	3,681	4,601	25.0	-7.6
Professional and Business Services	6,911	7,344	4,191	-42.9	-39.4
Other Services	2,337	2,687	2,862	6.5	22.5
Manufacturing	2,479	2,316	2,843	22.8	14.7
Financial Activities	3,316	2,510	2,558	1.9	-22.9
Leisure and Hospitality	4,282	3,720	1,856	-50.1	-56.7
Transportation and Warehousing	1,566	613	959	56.4	-38.8
Information	1,562	1,728	767	-55.6	-50.9
Utilities	561	619	275	-55.6	-51.0

Source: American Community Survey. Analysis by Beacon Economics.

Number of Outbound Commuters by Industry

Industry	2014	2019	2024	5-Year Chg. (%)	10-Year Chg. (%)
Total	51,595	44,263	37,911	-14.4	-26.5
Education and Health Services	10,123	7,030	7,829	11.4	-22.7
Professional and Business Services	9,686	11,719	7,584	-35.3	-21.7
NR/Construction	3,489	3,238	4,197	29.6	20.3
Government	4,546	3,099	4,074	31.5	-10.4
Financial Activities	5,573	4,951	3,538	-28.5	-36.5
Trade	6,052	5,180	2,804	-45.9	-53.7
Manufacturing	2,480	2,885	1,870	-35.2	-24.6
Leisure and Hospitality	4,036	2,505	1,811	-27.7	-55.1
Other Services	886	649	1,372	111.4	54.9
Information	2,280	1,956	1,328	-32.1	-41.8
Transportation and Warehousing	1,961	871	1,211	39.0	-38.2
Utilities	483	180	293	62.8	-39.3

Source: American Community Survey. Analysis by Beacon Economics.

About Beacon Economics

Founded in 2006, Beacon Economics, an LLC and certified Small Business Enterprise with the State of California, is an independent research and consulting firm dedicated to delivering accurate, insightful, and objectively based economic analysis. Employing unique proprietary models, vast databases, and sophisticated data processing, the company's specialized practice areas include sustainable growth and development, real estate market analysis, economic forecasting, industry analysis, economic policy analysis, and economic impact studies. Beacon Economics equips its clients with the data and analysis they need to understand the significance of on-the-ground realities and to make informed business and policy decisions.

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