San Carlos, California

Indicators Report

by
The National Economic Education Delegation (NEED)

January 27, 2025

Exploring the economics, demographics, and well-being of San Carlos and its residents through indicators.

This report was produced by the:

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Executive Summary

Assessing the City with Indicators

About this Report

This report provides background or summary information for the city of San Carlos (the City) in the form of indicators.

Using this Report

Indicators are measures of various aspects of a regional economy. They help to provide an indication of the quality of life in a region and progress toward improving conditions in the local economy. This report focuses on indicators for changing demographics, incomes, housing markets, commute patterns, and employment in San Carlos. These indicators are compared to San Mateo County (the County) as a whole, a broader region where one is well defined, California, and the United States.

This report is vital for understanding trends in the underlying economy. It does not provide forecasts, but Rob Eyler and Jon Haveman at Economic Forensics and Analytics are available to provide them if that is of interest.

Topics Covered:

- **Demographics:** A detailed snopshot of San Carlos demographics is presented. This provides evidence on the size, age and sex, income and poverty status, race and ethnicity, housing status, living arrangements, education, health, and transportation choices of the population. Beyond the current population level, data on trends in local population growth, in comparison with other broader regions is presented, in both tabular and graphical form.
- **Employment Report:** Here, we provide a brief snapshot or employment and unemployment in San Carlos and how the City's experience differs from broader regions.
- **Income and Earnings:** Vital to understanding the prosperity of a city relative to its surrounding area is information on income and earnings. We provide a ranking of the City's income relative to all cities in California as well as growth relative to local regions. Inequality and poverty status are also important indicators for the level of equity in the community. We provide evidence of trends in both, not only for all residents, but also for children separately.
- **Housing:** This section provides evidence on the cost and availability of housing. Both median home values and rental costs are included, along with detailed information on home ownership, by age and income, in particular. Further, evidence is provided on the housing burden in the City, again, in comparison with other broader regions. We also provide evidence on the rate at which new buildings and units are permitted along with a broader housing picture. Finally, we provide evidence on the age of the housing stock in San Carlos, along with information on how long the City's residents have been in place.
- **Transportation:** Increasingly important, in the wake of the pandemic, is an understanding of the transportation patterns and choices of local residents. We provide detailed evidence on the proprotion of residents who work from home and on the various transportation choices of those who head to the office. This information is also provided for those who work in San Carlos, but do not necessarily live in San Carlos.
- **Migration:** Population changes comes primarily through organic causes: births and deaths. Migration between regions also plays a significant role in population growth. A final section of the report provides evidence on migration into and out of the City.

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Demographics

Definition:

Data on the demographics of a city indicate the nature of the population, with a focus on age, gender, race and ethnicity, as well as household compositon.

Why is it important?

The characteristics and growth of San Carlos's population are fundamental indicators of the city's growth potential.

A Demographic Snapshot

Statistic	2023	2019
POPULATION		
Population Estimate (#, 5yr)	29,797.0	30,154.0
Veterans (#, 5yr)	717.0	
Foreign born persons (%, 5yr)	25.0	20.3
Population age 25+ (#, 5yr)	21,124.0	
AGE AND SEX		
Persons under 5 years (%, 5yr)	5.3	6.3
Persons under 18 years (%, 5yr)	23.9	24.8
Persons 65 years and over (%, 5yr)	16.5	15.6
Female persons (%, 5yr)	51.6	52.0
INCOME AND POVERTY		
Median household income ($, 5yr)	233,333.0	182,083.0
Per capita income in past 12 months ($, 5yr)	126,389.0	90,262.0
Persons in poverty (%, 5yr)	3.2	3.0
Children age less than 18 in poverty (#, 5yr)	295.0	70.0
Children age less than 18 in poverty (%, 5yr)	4.2	0.9
RACE AND ETHNICITY		
White alone (%, 5yr)	59.4	73.9
African American alone (%, 5yr)	0.8	0.8
American Indian or Alaska Native alone (%, 5yr)	0.2	0.1
Asian alone (%, 5yr)	21.9	16.4
Native Hawaiian and Other Pacific Islander alone (%, 5yr)	0.8	0.2
Two or More Races (%, 5yr)	13.2	6.0
Hispanic or Latino (%, 5yr)	10.7	9.1
White alone, not Hispanic or Latino (%, 5yr)	57.3	67.9
HOUSING		
Housing units (#, 5yr)	11,679.0	11,689.0
Owner-occupied housing units (%, 5yr)	68.2	72.4
Median value of owner-occupied housing units ($, 5yr)	2,000,001.0	1,625,700.0
Median selected monthly owner costs-with a mortgage ($, 5yr)	4,001.0	4,001.0
Median selected monthly owner costs-without a mortgage ($, 5yr)	1,220.0	909.0
Median gross rent ($, 5yr)	2,802.0	2,321.0
FAMILIES AND LIVING ARRANGEMENTS		
Households (#, 5yr)	11,052.0	11,223.0
Persons per household (#, 5yr)	2.7	2.7
Living in same house 1 year ago, % of persons age 1+ (5yr)	88.1	87.9
EDUCATION		
High school graduate or higher, % of persons age 25+ (5yr)	96.7	
Bachelor's degree or higher, % of persons age 25+ (5yr)	68.1	
HEALTH		
With a disability, under age 65 years (#, 5yr)	1,095.0	
Persons without health insurance, under age 65 years (%, 5yr)	0.4	1.5
LABOR FORCE		
In civilian labor force, persons age 16+ (%, 5yr)	71.0	
In civilian labor force, women age 16+ (%, 5yr)	67.4	
Employed, persons age 16+ (%, 5yr)	64.5	
Self employed (%, 5yr)	10.4	
TRANSPORTATION		
Mean travel time to work, workers age 16+ (Mins., 5yr)	17.8	
Drive alone in private vehicle (%, 5yr)	56.1	
Using public transportation (%, 5yr)	5.6	
Worked from home (%, 5yr)	33.7	

Source: American Community Survey, Summary Files
Note: Data are from the 1-year files unless indicated by the notation 5yr.

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Current Population

The data in these two tables and the following two graphs are from the CA Department of Finance (DOF). The DOF produces population estimates for geographies around California twice a year: January and July. As estimates for cities are only available in January, these two tables are based on the January data. The remaining figures are from the American Community Survey (ACS), provided annually by the U.S. Bureau of the Census.

Table 1. Population Change by Region
(Thousands, January to January)

Region	2024 Population	% Change 1 Year	% Change 3 Year	% Change 5 Year
City				
San Carlos	29,420	−0.94	−2.61	−0.78
County and Broader Regions				
San Mateo County	741,565	−0.50	−1.33	−4.22
Bay Area	7,588,780	−0.14	−0.98	−2.38
California	39,128,162	0.17	−0.45	−1.43

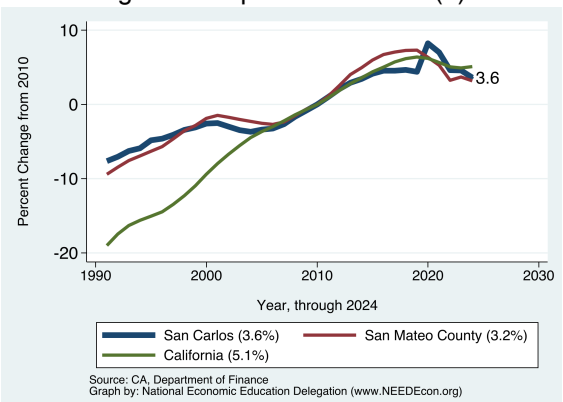
Source: CA DOF; Calculations by National Economic Education Delegation

Table 2. County Population Change by City
(Thousands, January to January)

City	2023	2024	% Change Local	% Change Bay Area	% Change California
San Mateo County	745.3	741.6	−0.50	−0.14	0.17
San Mateo	104.2	103.4	−0.79		
Daly City	102.5	101.5	−1.03		
Redwood City	82.1	81.9	−0.34		
South San Francisco	64.8	64.6	−0.25		
San Bruno	42.5	42.2	−0.94		
Pacifica	37.4	37.1	−0.89		
Menlo Park	32.9	33.1	0.60		
Foster City	32.9	32.6	−1.03		
Burlingame	30.4	30.5	0.34		
San Carlos	29.7	29.4	−0.94		
East Palo Alto	29.0	29.1	0.42		
Belmont	27.2	26.9	−0.92		
Millbrae	22.7	23.1	1.79		
Half Moon Bay	11.3	11.2	−0.79		
Hillsborough	11.1	11.1	−0.19		
Atherton	7.0	7.0	0.06		
Woodside	5.2	5.1	−0.83		
Brisbane	4.7	4.7	−0.72		
Portola Valley	4.3	4.2	−0.79		
Colma	1.4	1.4	−1.12		

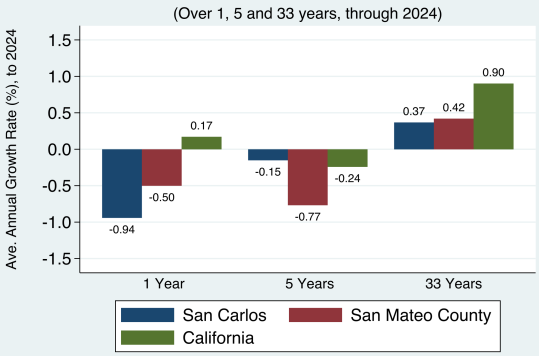
Source: CA DOF; Calculations by National Economic Education Delegation

Figure 1: Population Growth (1)



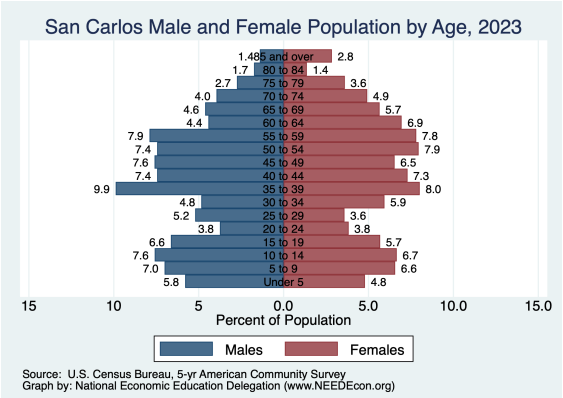
Source: CA, Department of Finance
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 2: Population Growth (2)

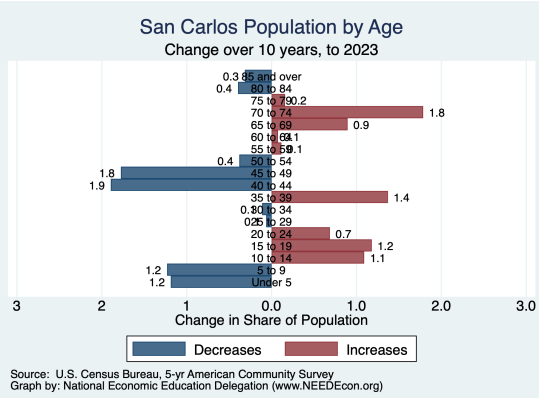


Source: California Department of Finance, Report Series E-4.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 3: Population by Age - Detailed Age Categories

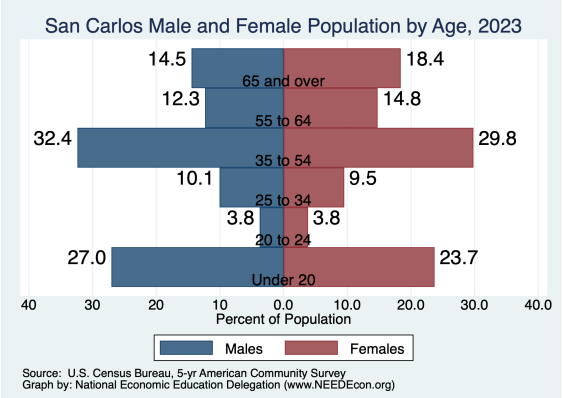


Source: U.S. Census Bureau, 5-yr American Community Survey
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

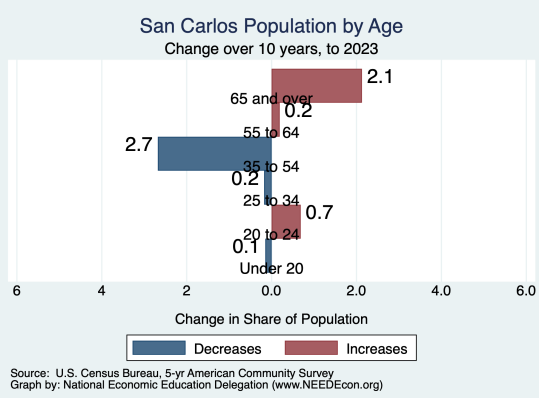


Source: U.S. Census Bureau, 5-yr American Community Survey
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 4: Population by Age - Broad Age Categories



Source: U.S. Census Bureau, 5-yr American Community Survey
Graph by: National Economic Education Delegation (www.NEEDEcon.org)



Source: U.S. Census Bureau, 5-yr American Community Survey
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

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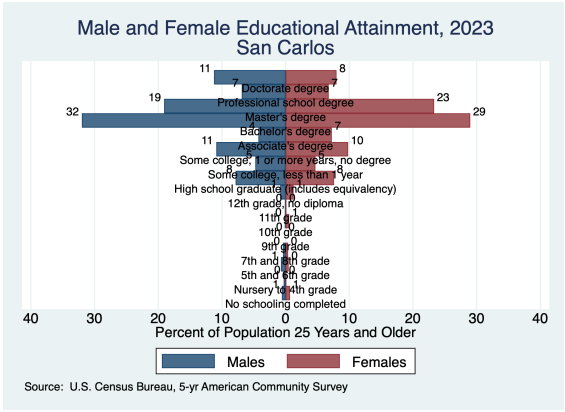
Figure 5: Population by Educational Attainment



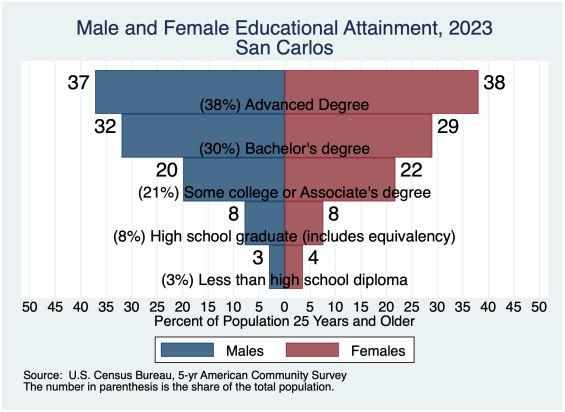


Figure 6: Population by Race/Ethnicity

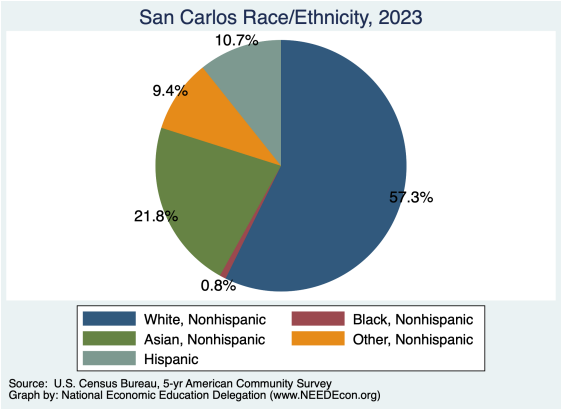


Figure 7: Population by Race/Ethnicity Over Time

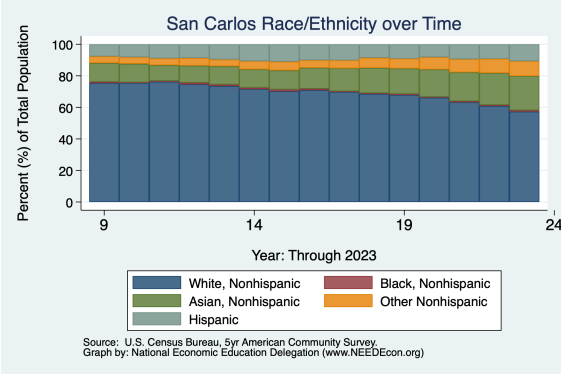


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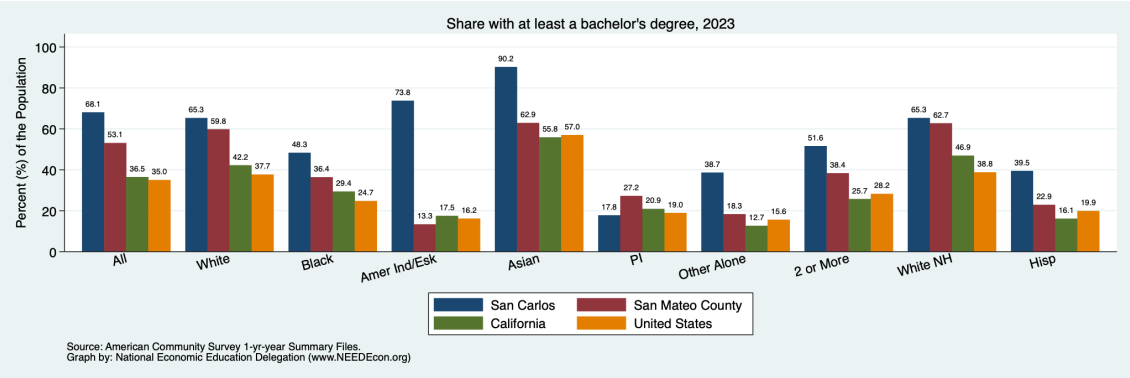
Figure 8: Education by Race/Ethnicity



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Employment Report

Citywide Employment and Unemployment

Definition:

Each month, California's Employment Development Division (EDD) publishes an update on employment in California and in MSAs, counties, and cities all across the state. The report focuses primarily on non-farm employment, providing estimates of changes in employment by industry as well as unemployment in each region. Data for cities is limited to aggregate employment, labor force, and unemployment data. Those are reported below.

Why is it important?

Employment growth is a fundamental indicator of the health of an economy.

Table 3. San Carlos Summary for November, 2024

Category	Current Value	Change From: Last Month	2 Months Ago	Last Year
Employment	16,172	-15	−80	-401
Labor Force	16,817	13	−168	-403
Number Unemployed	622	14	12	1
Unemployment Rate	3.7	0.1	0.1	0.1

Source: EDD, National Economic Education Delegation

Figure 9: Historical Employment and Unemployment

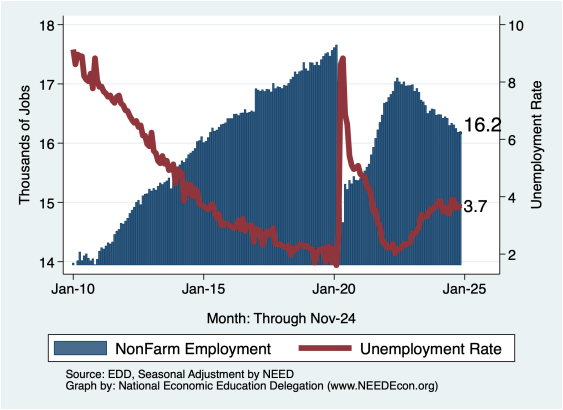

Figure 10: Employment and Unemployment - Last 12 Months

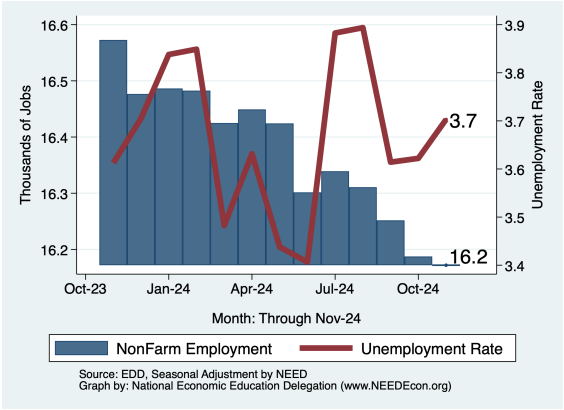

Figure 11: Relative Employment Growth Across Regions - since 2010

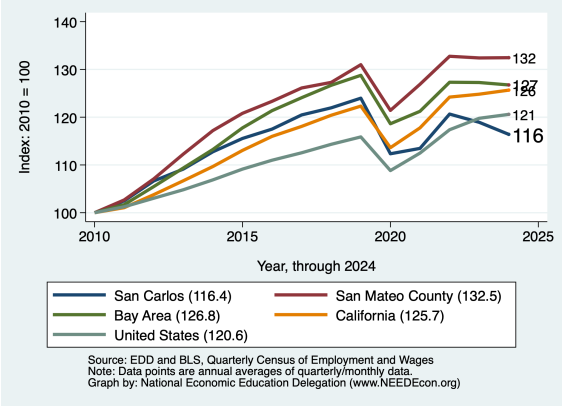

Figure 12: Relative Employment Growth Across Regions - since 2019

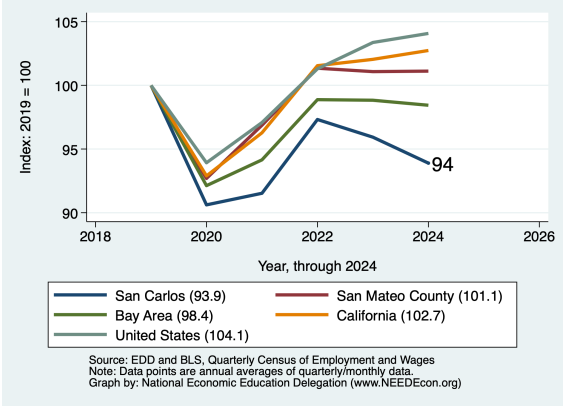

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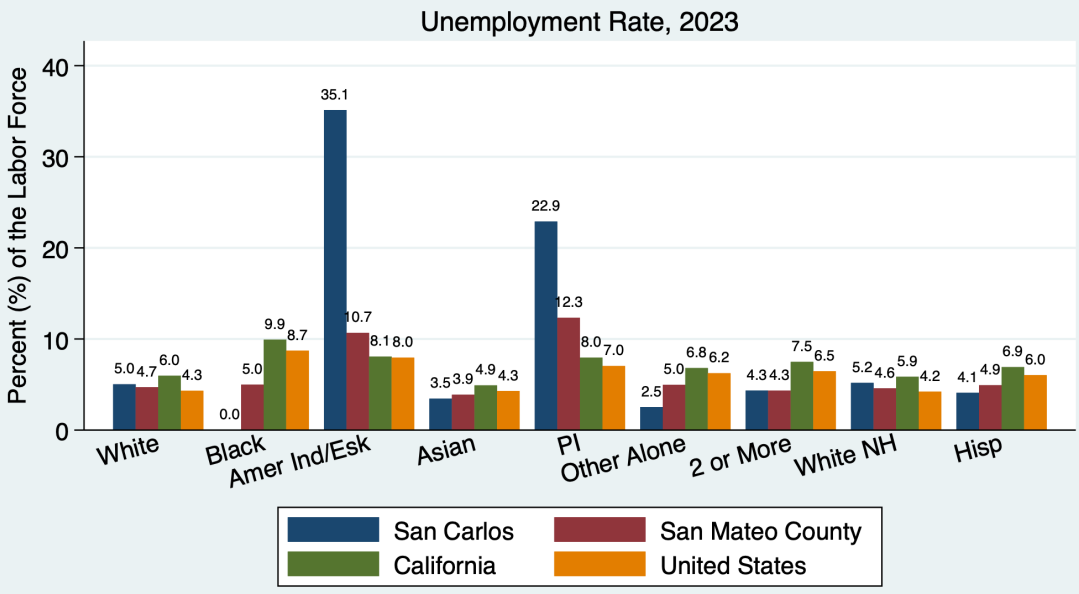
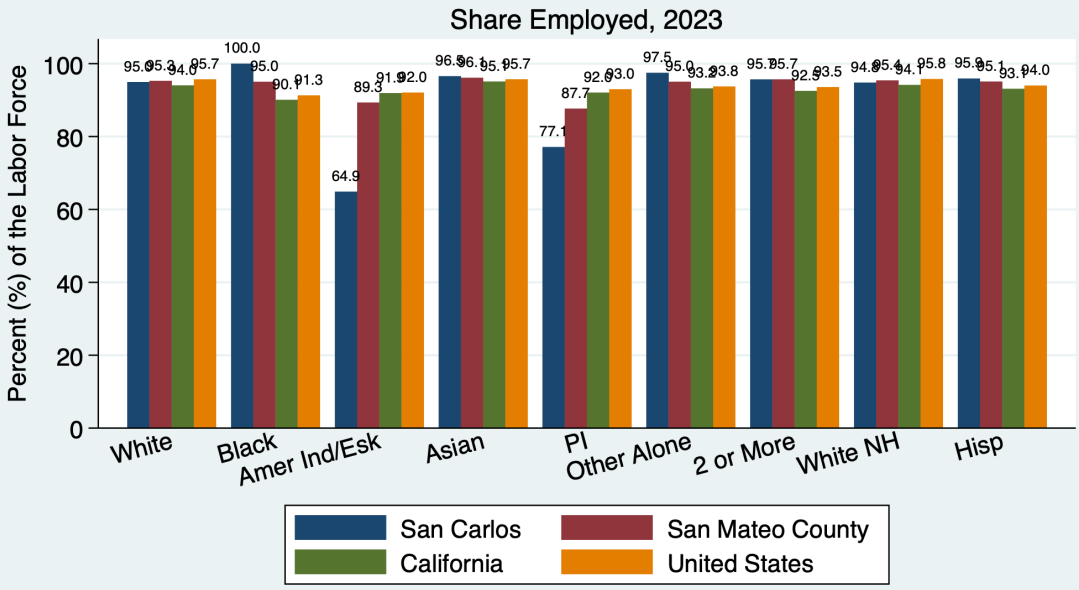
Figure 13: Unemployment Rate by Race



Source: American Community Survey 1-yr-year Summary Files.
The labor force is individuals aged 16-64 who are either employed or looking for work.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 14: Employment Rate by Race



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The labor force is individuals aged 16-64 who are either employed or looking for work.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

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County Employment by Industry

California's Employment Development Division (EDD) does not regularly produce data on employment by industry for cities. However, we are able to report indsutry-level employment data for San Mateo County. The following table provides the latest data for the County.

Table 4. Employment Growth by Industry in San Mateo County for November, 2024

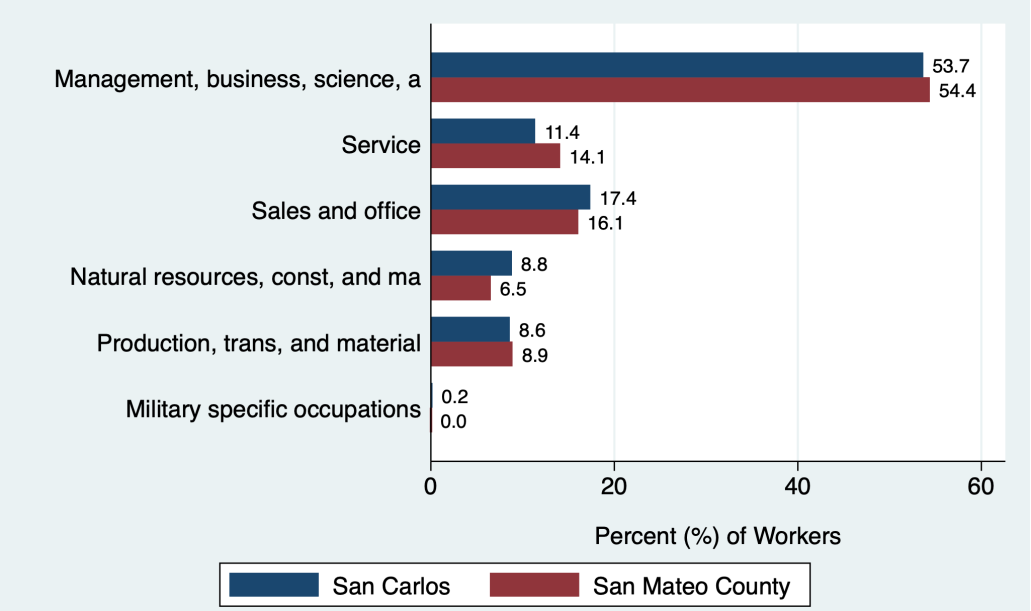
Industry	Employment	Share	Empl Growth	% Growth - Annualized Rate					
				Month	Qtr	6mo	1yr	3yr	5yr
Total Nonfarm	419,041	100.0	−494.0	−1.4	−0.6	−0.9	0.0	0.5	−0.0
Goods Producing	38,303	9.1	−167.2	−5.1	−7.0	−5.5	−4.2	−4.4	−3.6
Mining, Logging and Construction	16,863	4.0	−92.6	−6.4	−10.2	−4.8	−5.0	−3.8	−4.2
Manufacturing	21,672	5.2	−98.7	−5.3	−6.5	−7.4	−4.6	−4.9	−3.1
Durable Goods	9,318	2.2	39.9	5.3	−1.2	−3.0	−1.7	−3.2	−3.4
Non-Durable Goods	12,198	2.9	−175.0	−15.7	−11.4	−10.0	−7.5	−6.3	−3.0
Service Providing	379,858	90.6	−133.5	−0.4	0.8	−0.5	0.2	1.0	0.4
Trade, Trans & Utilities	65,972	15.7	−57.0	−1.0	4.8	1.5	2.9	1.0	−1.2
Wholesale Trade	12,965	3.1	−103.7	−9.1	0.9	0.6	−1.1	6.0	2.9
Retail Trade	29,950	7.1	103.8	4.3	4.7	2.1	3.5	0.0	−1.4
Information	48,514	11.6	−241.7	−5.8	−0.9	−4.9	−5.8	−4.8	0.6
Financial Activities	22,415	5.3	−103.7	−5.4	1.6	1.0	1.3	−0.7	−1.5
Finance & Insurance	16,137	3.9	−25.1	−1.9	2.4	3.0	2.5	−0.4	−0.8
Real Estate & Rental & Leasing	6,170	1.5	−88.9	−15.8	−0.4	−3.9	−3.9	−2.2	−3.5
Professional & Business Srvcs	93,522	22.3	−302.5	−3.8	−0.7	−0.6	−0.9	0.1	1.6
Prof, Sci, & Tech	66,102	15.8	37.1	0.7	3.4	0.4	−1.1	1.6	2.5
Educational & Health Srvcs	59,187	14.1	117.1	2.4	1.9	1.1	1.5	3.8	2.3
Education Srvcs	12,381	3.0	38.3	3.8	−0.8	1.7	3.1	4.4	1.8
Health Care & Social Assistance	46,895	11.2	51.7	1.3	2.2	0.7	1.5	3.7	2.4
Leisure & Hospitality	43,527	10.4	24.3	0.7	−3.5	−1.4	0.9	6.2	−1.1
Arts, Entertainment & Recreation	6,195	1.5	46.7	9.5	7.8	1.8	1.8	8.7	0.5
Accommodation & Food Srvcs	37,168	8.9	43.1	1.4	−4.9	−1.8	0.3	5.6	−1.5
Other Srvcs	14,919	3.6	−48.6	−3.8	−2.2	2.9	4.4	10.0	2.3
Government	31,421	7.5	−12.6	−0.5	0.1	0.0	0.9	1.4	−0.2
Federal	2,550	0.6	0.0	0.0	−1.8	−2.7	−1.9	−7.6	−5.0
State	597	0.1	−2.7	−5.2	−1.5	−1.3	−0.5	−0.2	−0.1
Local	28,687	6.8	15.3	0.6	4.0	2.9	2.4	3.0	0.6

Source: EDD, National Economic Education Delegation (NEED)

Some Employee Detail

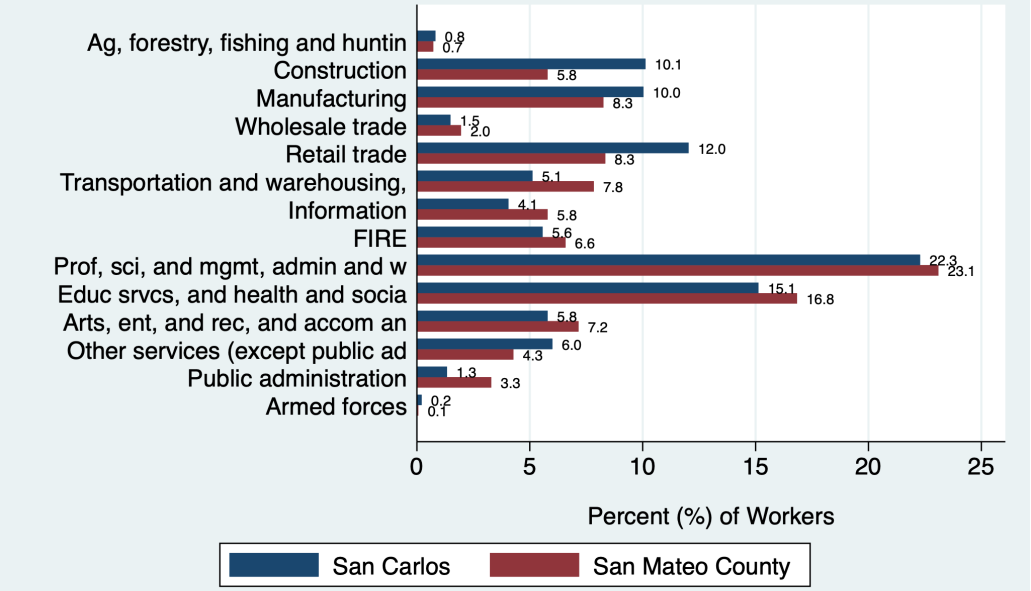
Employed in San Carlos

Figure 15: Employment by Occupation



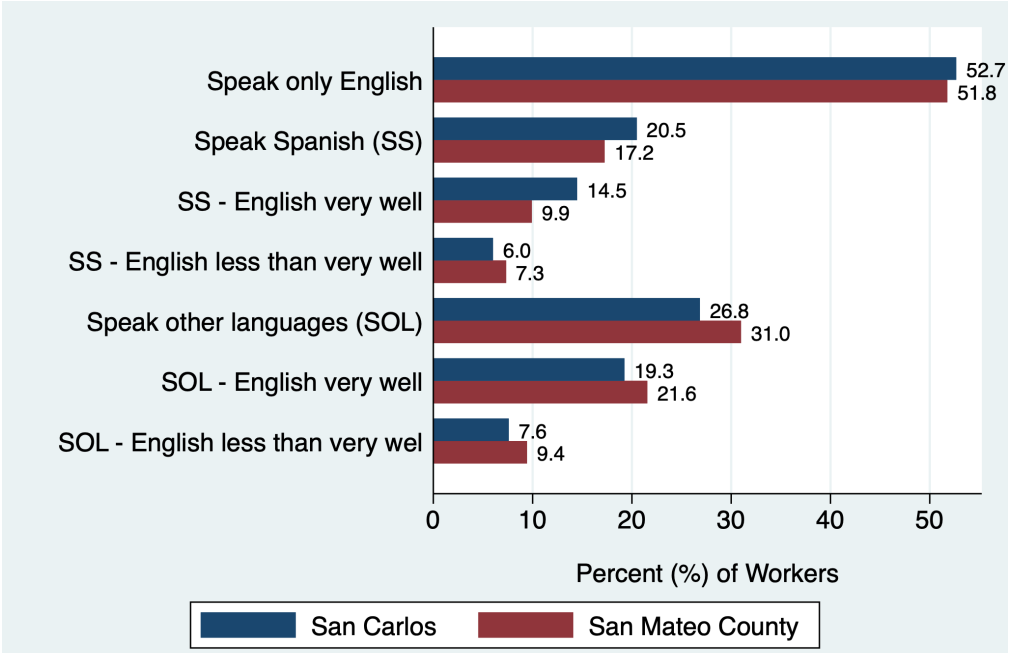
Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 16: Employment by Industry



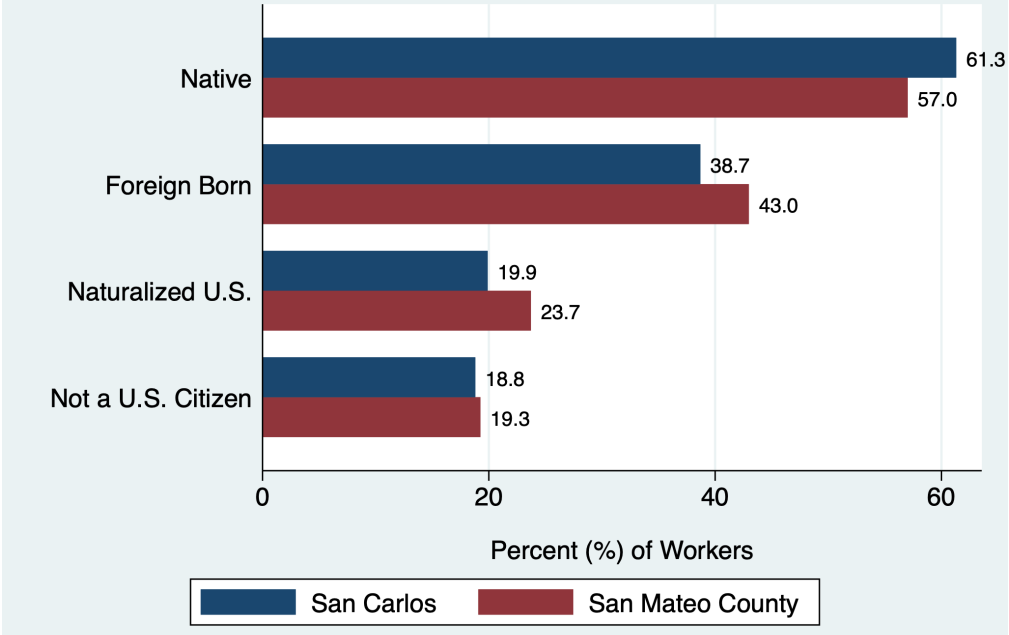
Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 17: Language Spoken at Home



Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

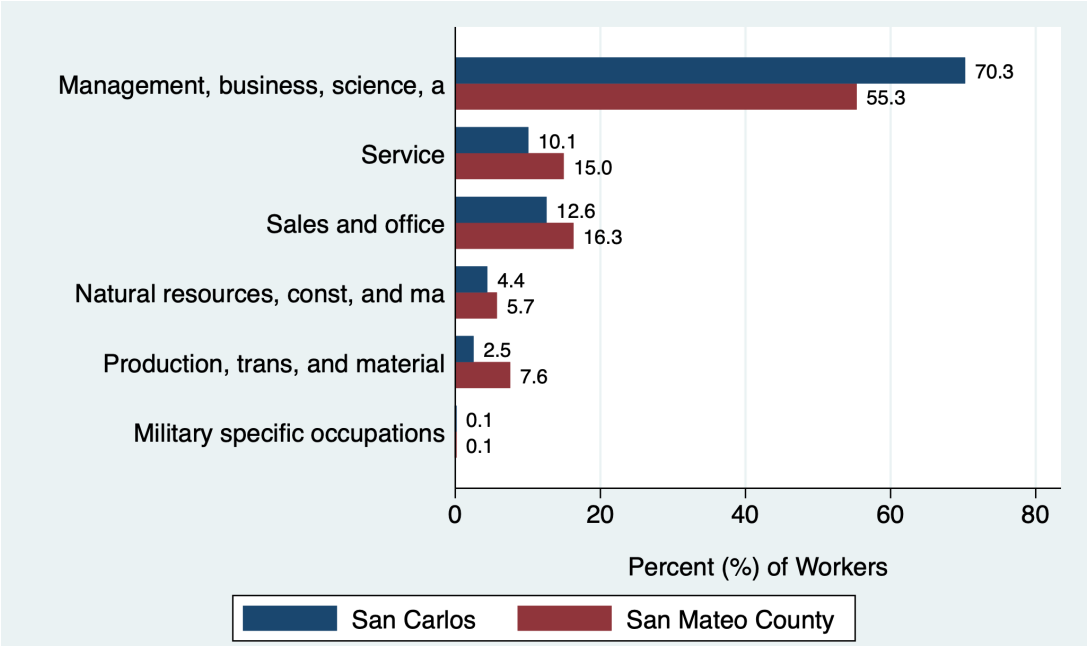
Figure 18: Citizenship



Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

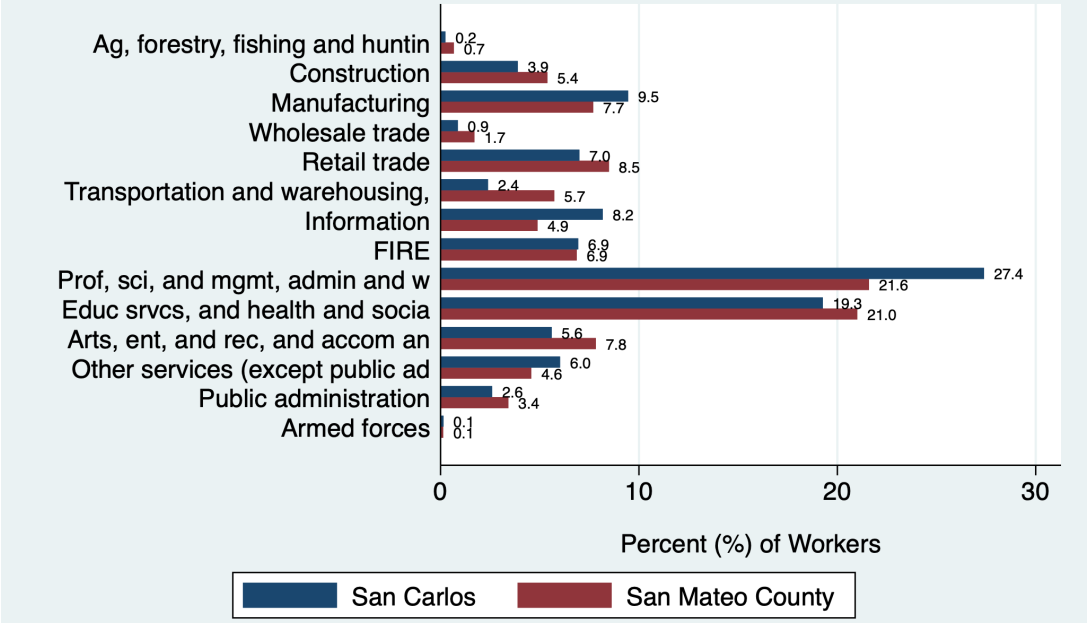
Employed Residents of San Carlos

Figure 19: Employment by Occupation



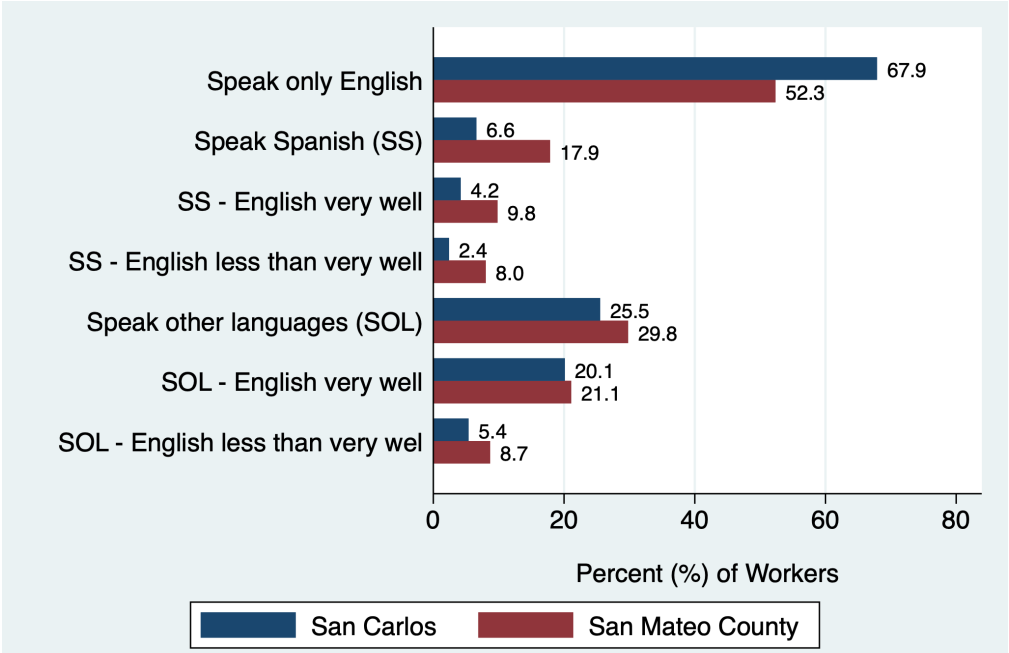
Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 20: Employment by Industry



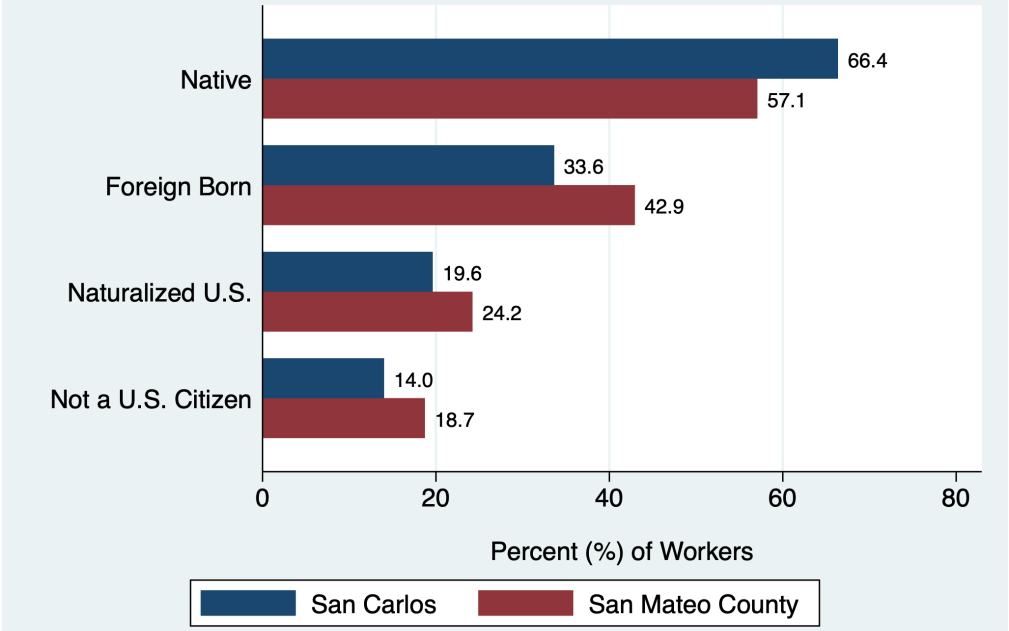
Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 21: Language Spoken at Home



Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

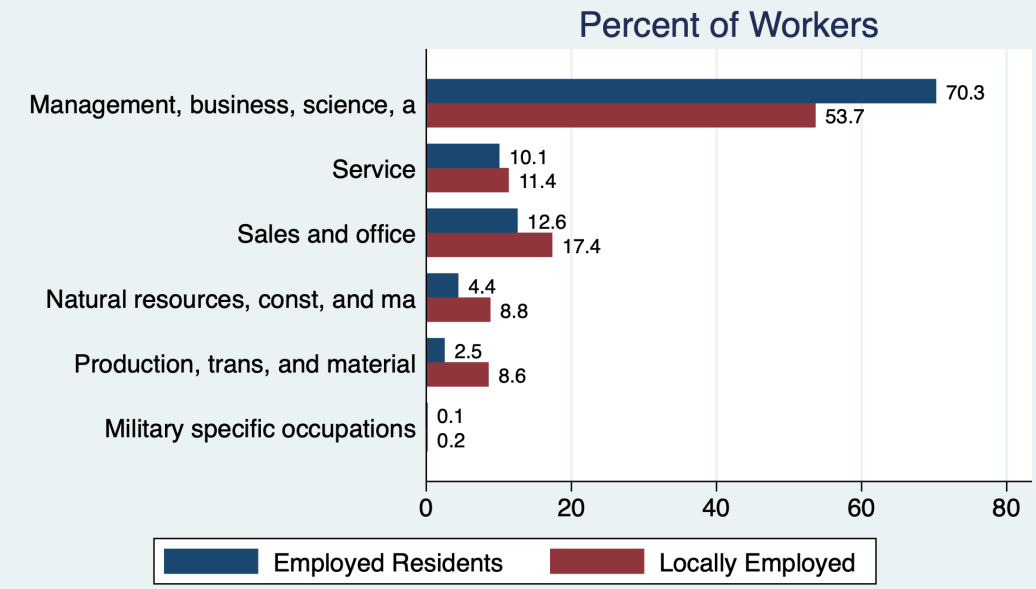
Figure 22: Citizenship



Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

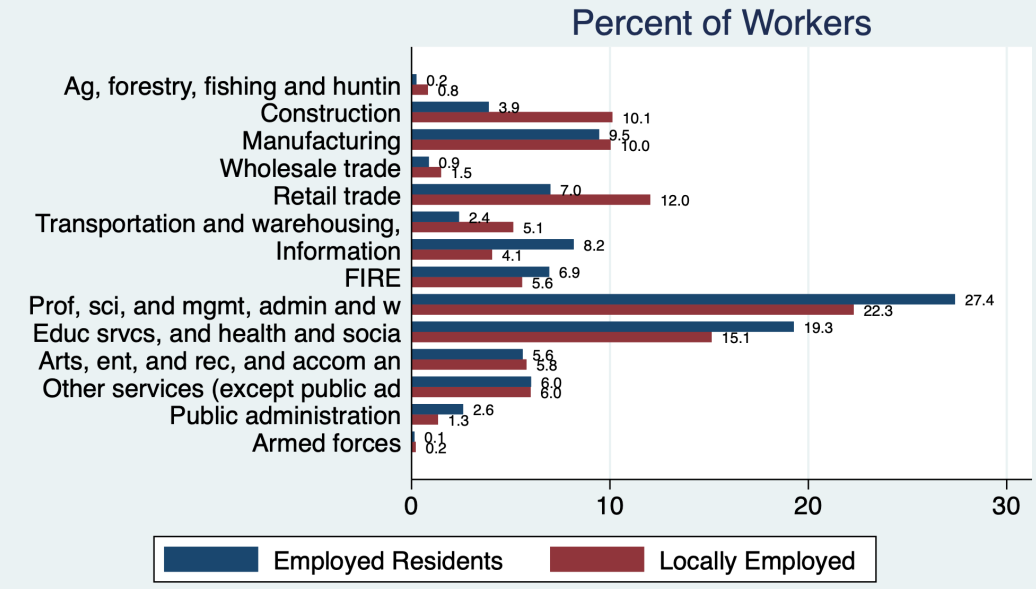
Employed Residents vs Workers in San Carlos

Figure 23: Employment by Occupation



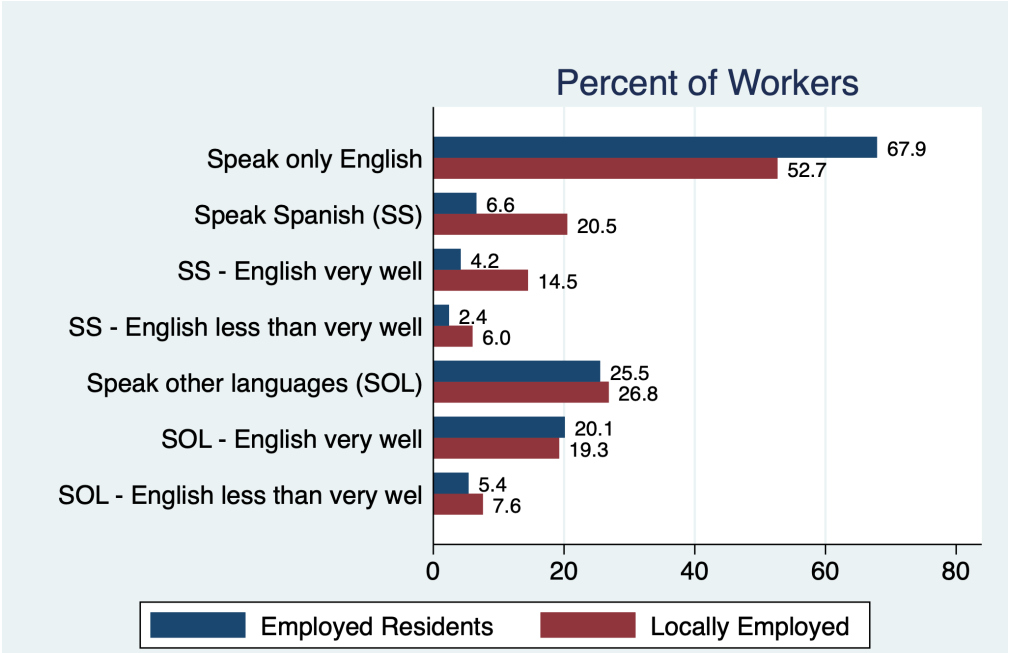
Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 24: Employment by Industry



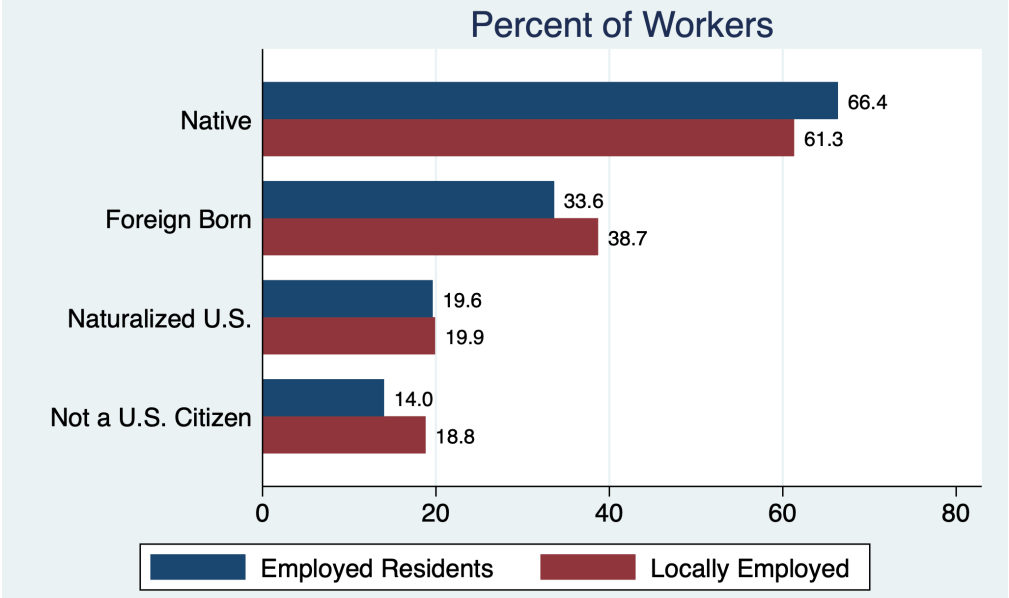
Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 25: Language Spoken at Home



Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 26: Citizenship



Source: American Community Survey, 2023 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Income and Earnings

Per Capita Income Growth

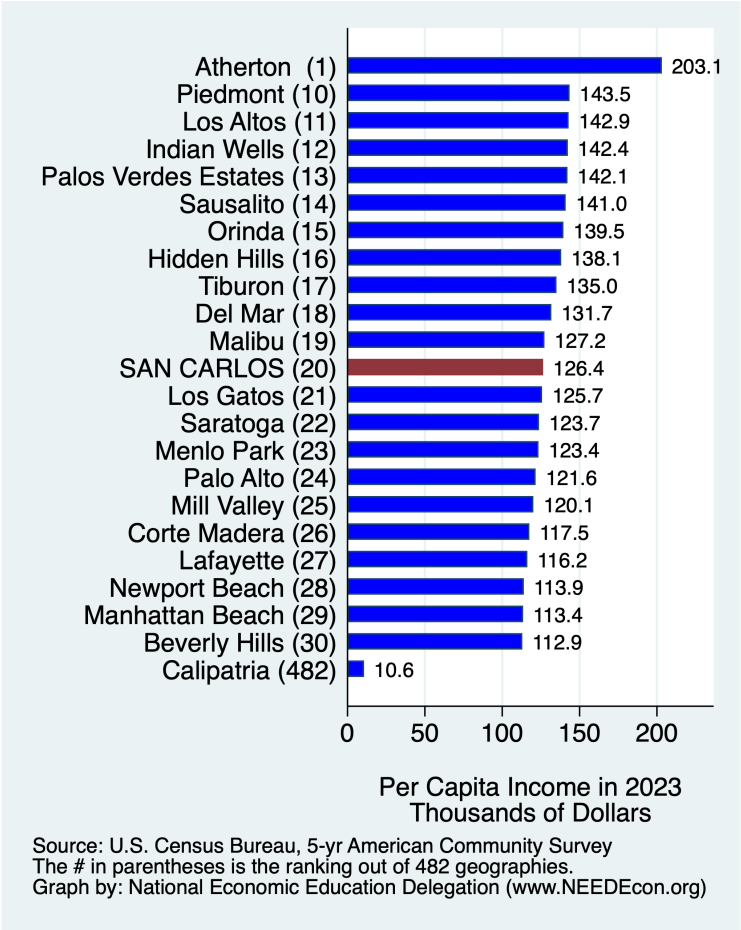
Definition:

Per capita income is the average income per person in San Carlos. Personal income is the income received by, or on behalf of, all persons from all sources: from participation as laborers in production, from owning a home or unincorporated business, from the ownership of financial assets, and from government and business in the form of transfer receipts. Noncash government benefits are not included.

Why is it important?

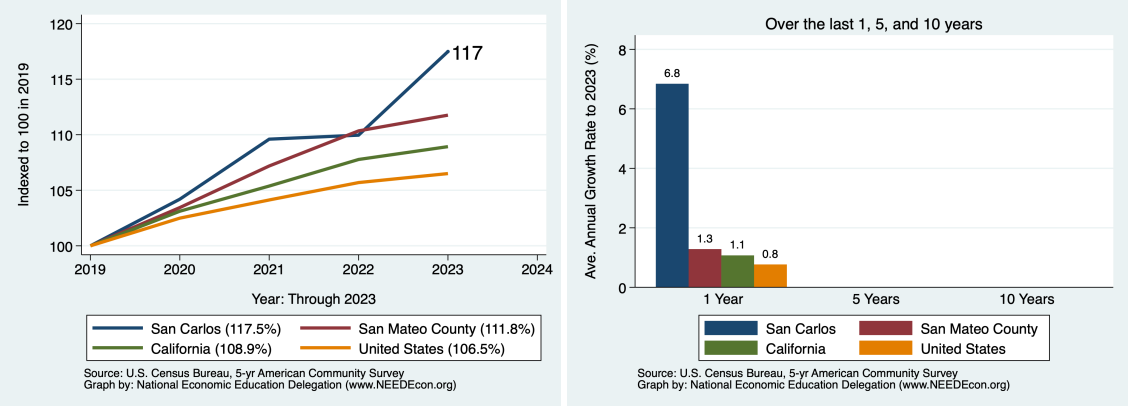
Income is the money that is available to persons for consumption expenditures, taxes, interest payments, transfer payments to governments and the rest of the world, or for saving. As such, it is an important indicator of economic well-being in a community.

Figure 27: Real Per Capita Income Ranking Among California Cities



Source: U.S. Census Bureau, 5-yr American Community Survey
The # in parentheses is the ranking out of 482 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 28: Regional Comparison of Growth over Time



Real Per Capita Income Ranking Among California Cities - w/Comparable Populations

Figure 29: Income Levels

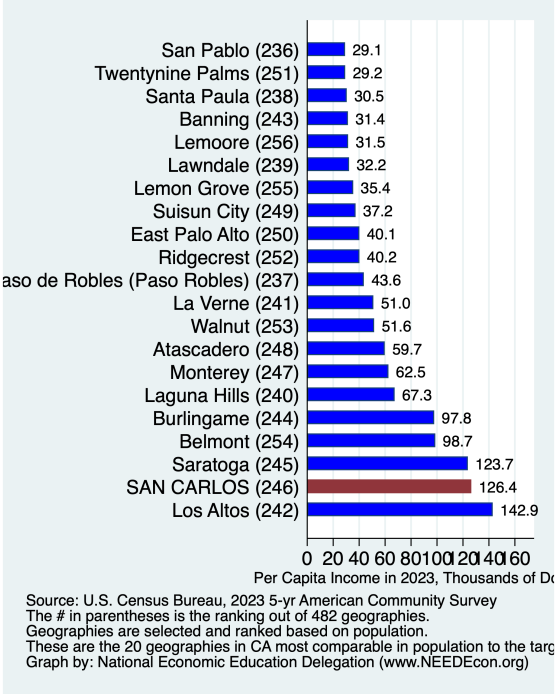
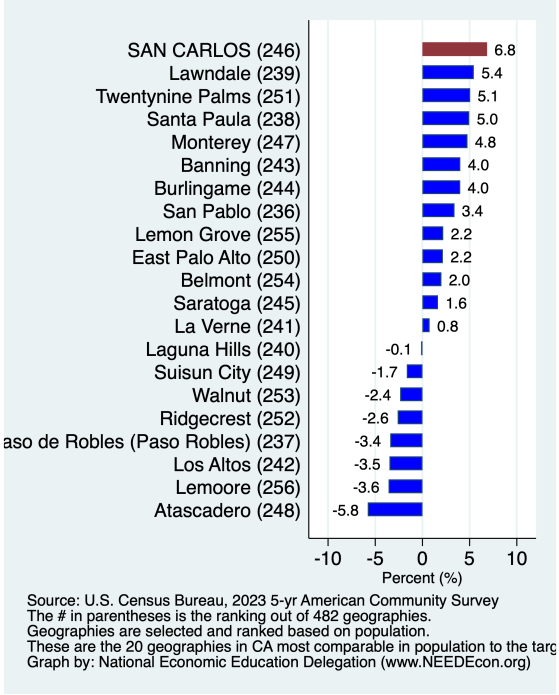


Figure 30: Growth over Time



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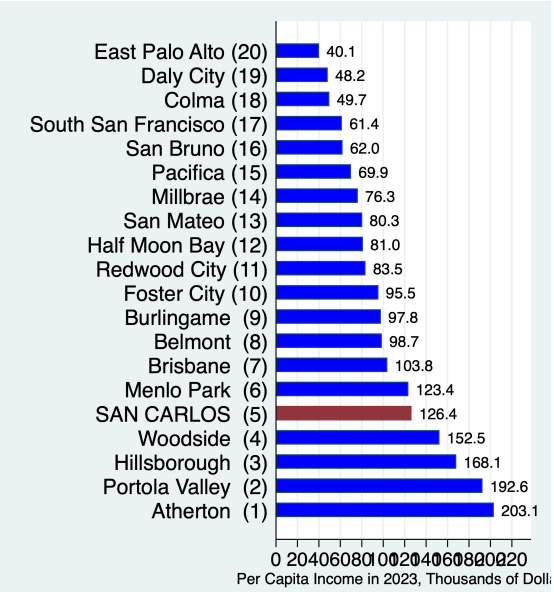
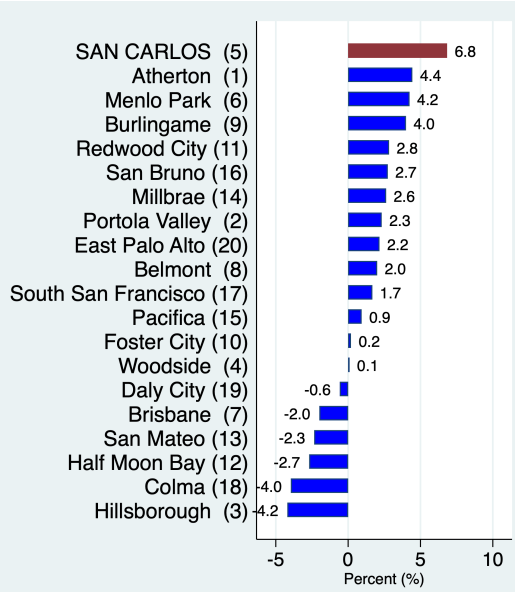
Real Per Capita Income Ranking Among Cities in San Mateo County

Figure 31: Income Levels



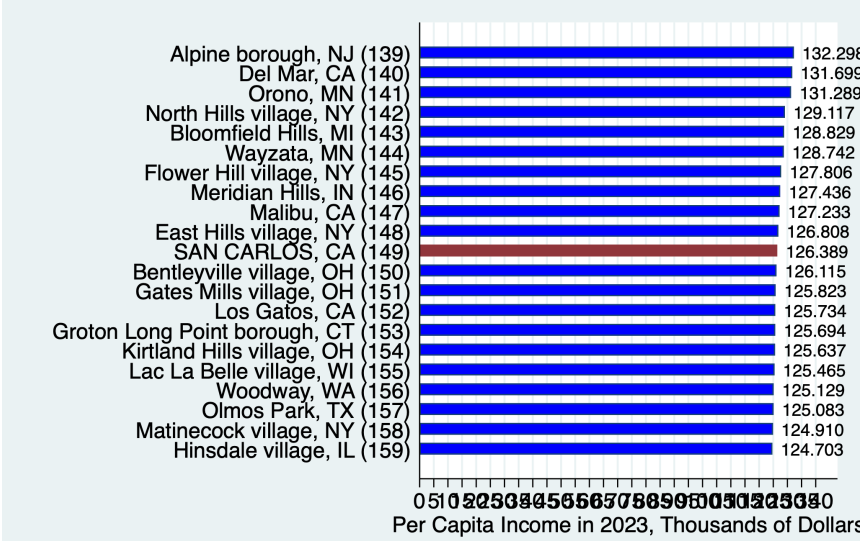
Source: U.S. Census Bureau, 2023 5-yr American Community Survey
The # in parentheses is the ranking out of 20 geographies.
Geographies are selected and ranked based on population.
These are the cities in the same county as the target city.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 32: Growth over Time



Source: U.S. Census Bureau, 2023 5-yr American Community Survey
The # in parentheses is the ranking out of 20 geographies.
Geographies are selected and ranked based on population.
These are the cities in the same county as the target city.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 33: Comparison with All Cities Nationwide



Source: U.S. Census Bureau, 5-yr American Community Survey
The # in parentheses is the ranking out of 19,680 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

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Figure 34: Per Capita Income by Race

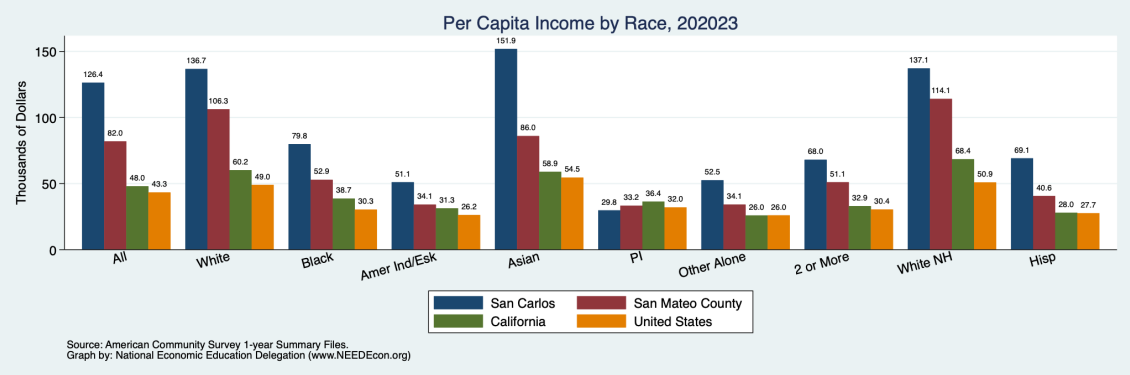
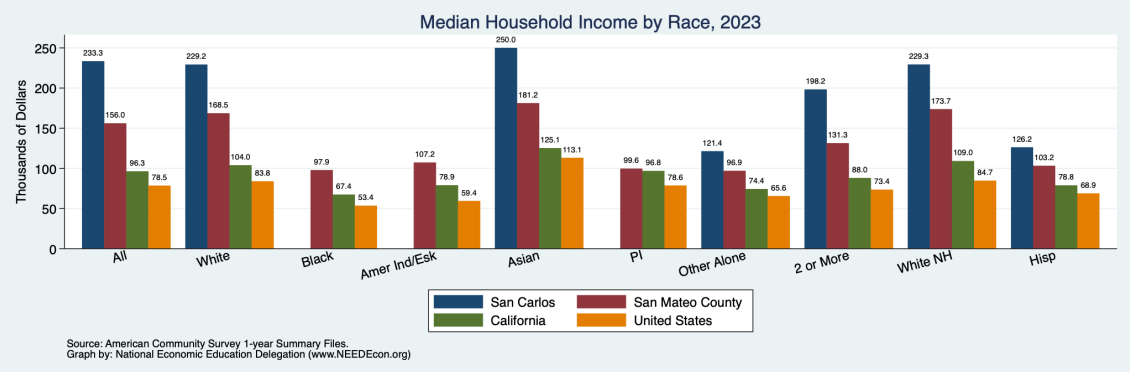


Figure 35: Median Household Income by Race



Poverty and Inequality

Definition:

The local poverty rate provides an indication of the well-being of those at the bottom of the income distribution. The federal poverty rate measures the proportion of households in the region that are classified as living in poverty. Also included are measures of the extent to which the City's children are impoverished. Measures of the income distribution provide further evidence on disparities in income in the region and how those disparities have changed over time.

Why is it important?

It is important to track measures of poverty and inequality to assess the extent of income disparities in the region, with an eye toward understanding how well the local economy is performing for all of its citizens.

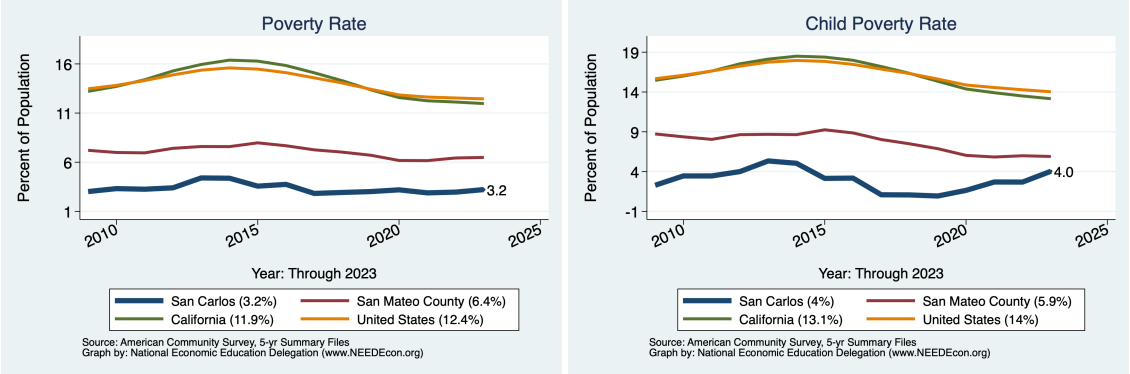


Figure 36: Inequality

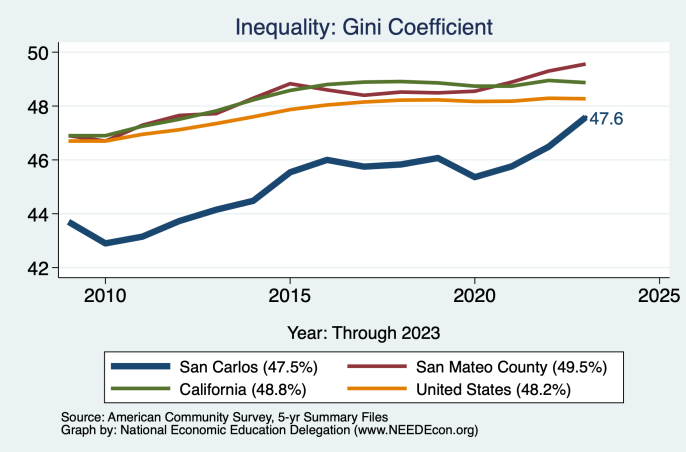
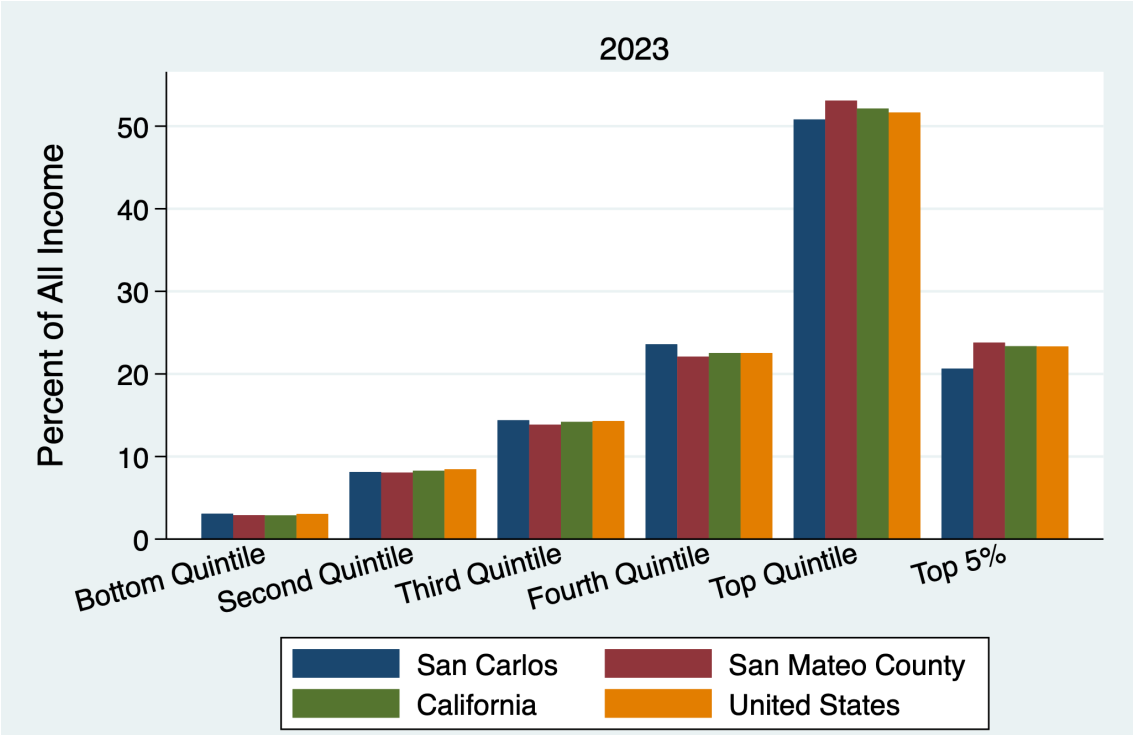
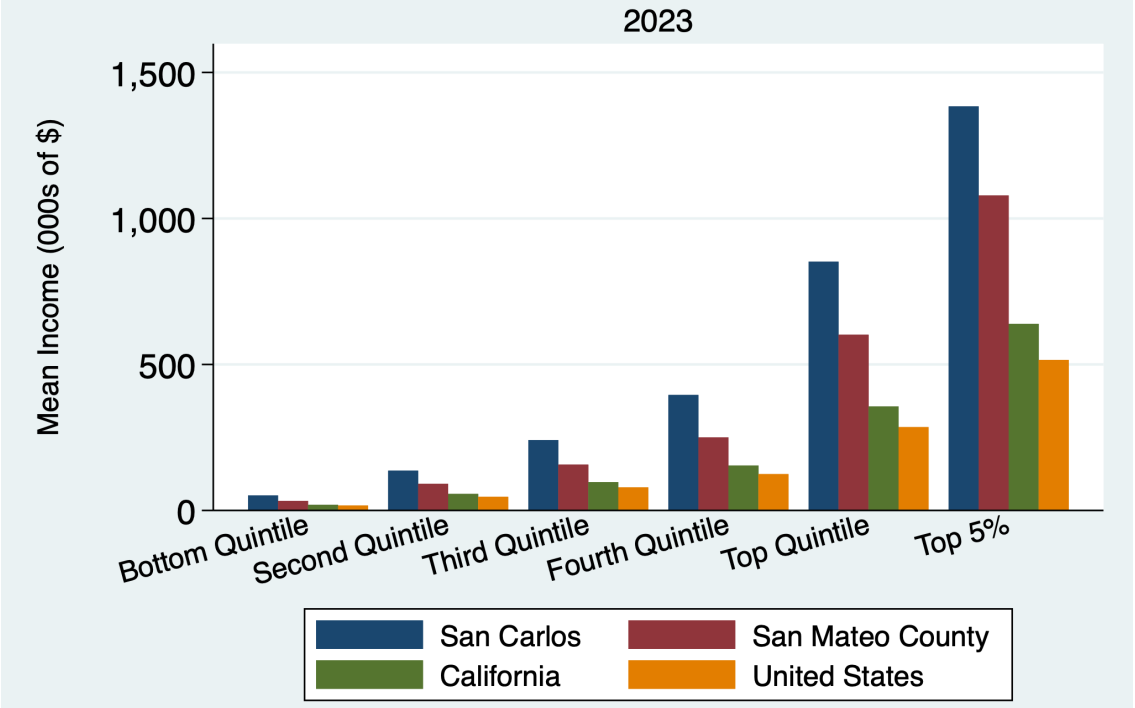


Figure 37: Shares Across the Income Distribution



Source: American Community Survey, 5-yr Summary Files
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 38: Means Across the Income Distribution



Source: American Community Survey, 5-yr Summary Files
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Housing

Housing Costs and Affordability

Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. Housing burden is defined as a household needing to commit more than 30% of their household income toward housing costs. The median value is the amount in the middle. Fifty percent of units are above the median and 50 percent are below.

Why is it important?

Housing is one of three fundamental necessities, along with food and clothing. A measure of the cost of housing is an integral part of the measurement of the cost of living in a specific community. This is particularly true in cities and regions throughout the Bay Area, where housing costs are high relative to income.

Cost of Housing in San Carlos and Broader Regions

Figure 39: Median Home Prices

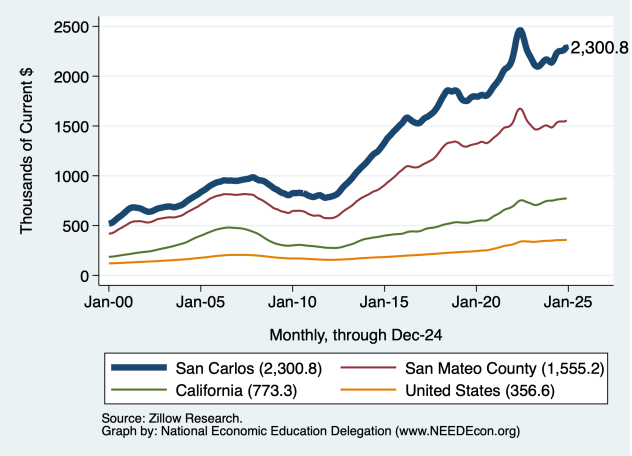
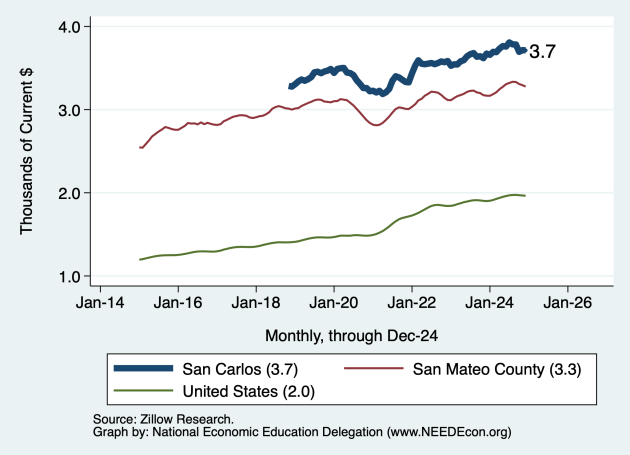


Figure 40: Median Rents



Housing Ownership in San Carlos and Broader Regions

Figure 41: Home Ownership Rates

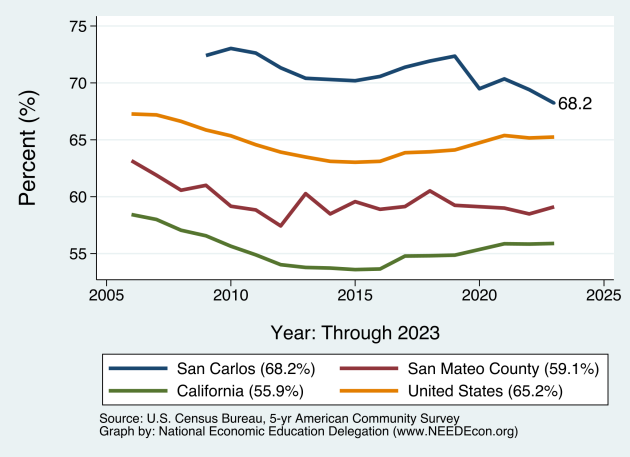


Figure 42: Home Ownership by Age

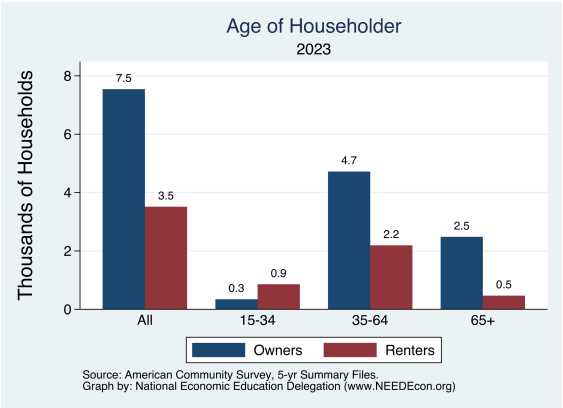


Figure 43: Income by Tenure

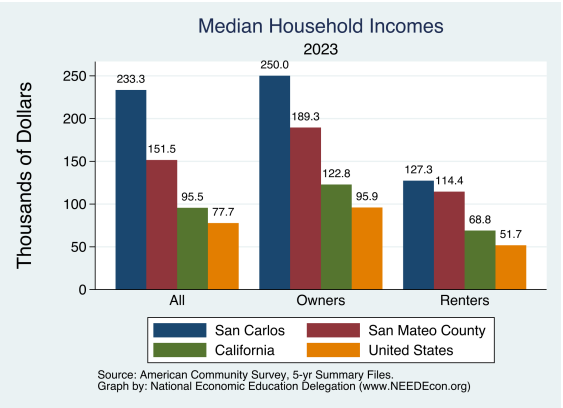


Figure 44: Home Ownership by Race

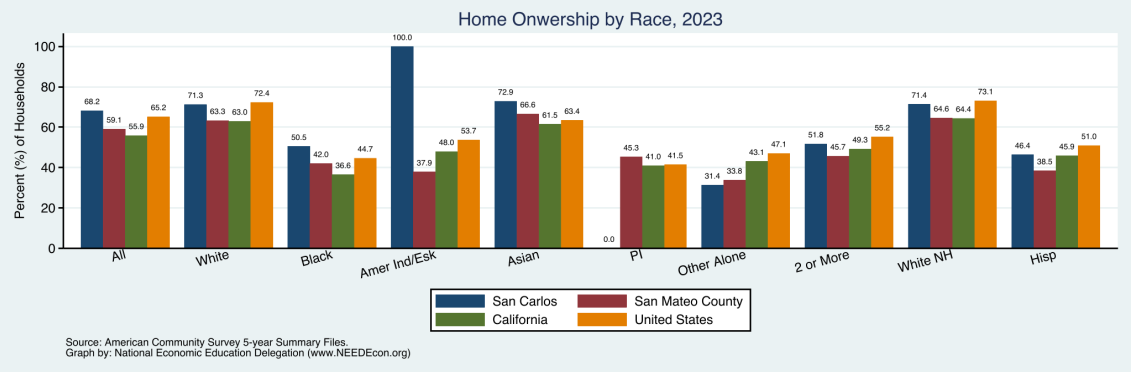


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Figure 45: Income Distribution by Tenure

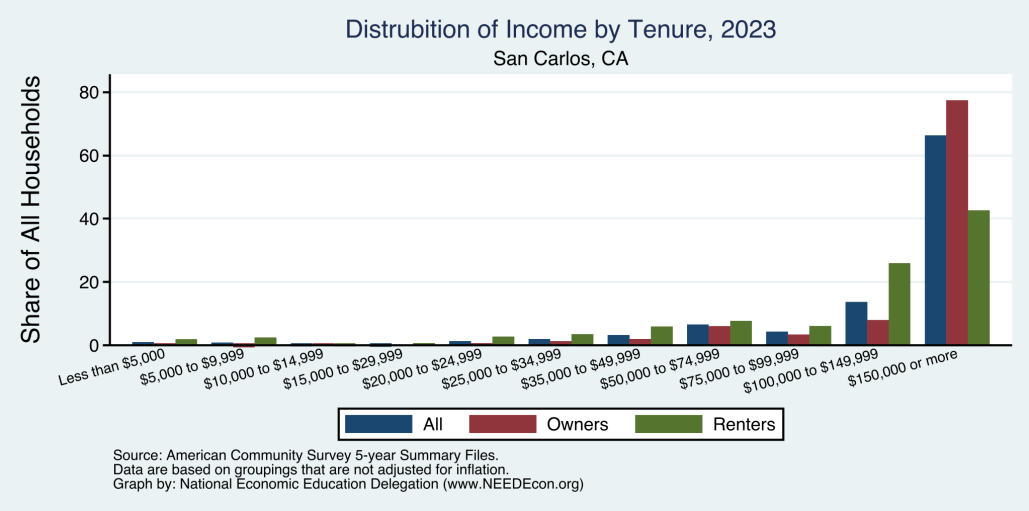


Figure 46: Income Distribution of Home Owners

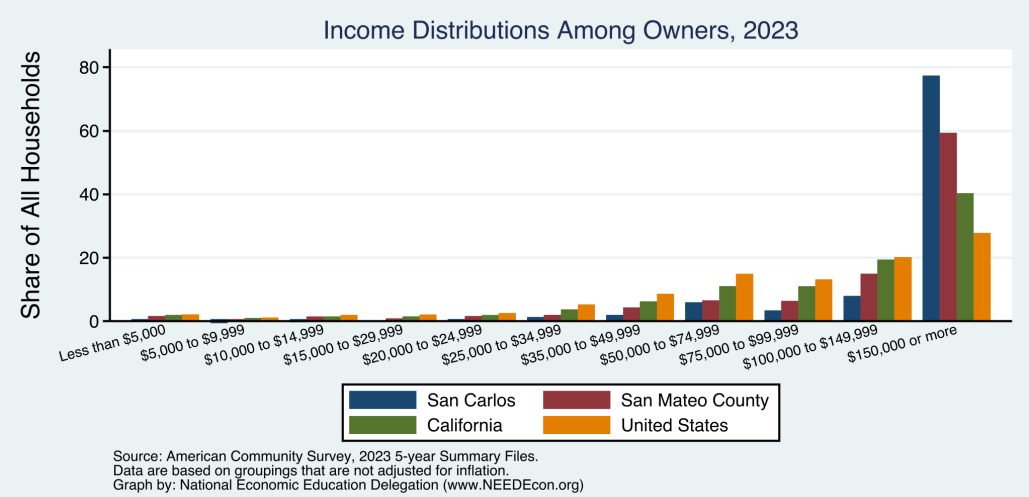
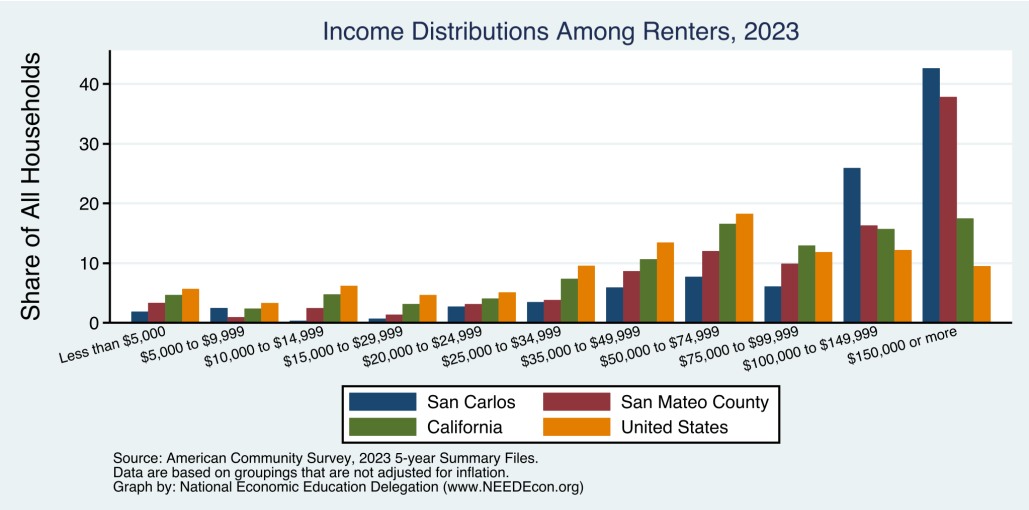


Figure 47: Income Distribution of Renters



Housing Burden in San Carlos and Broader Regions

Figure 48: Home Owners w/ A Mortgage

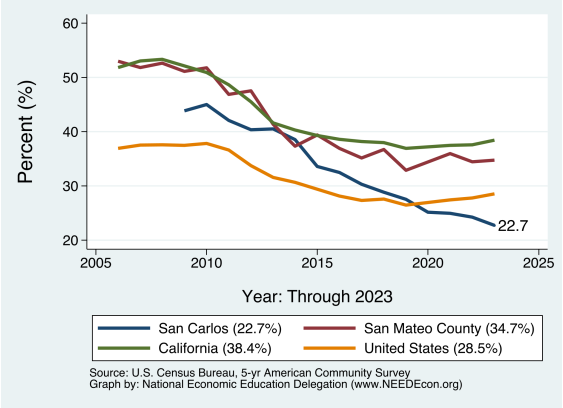


Figure 49: Home Owners w/o A Mortgage

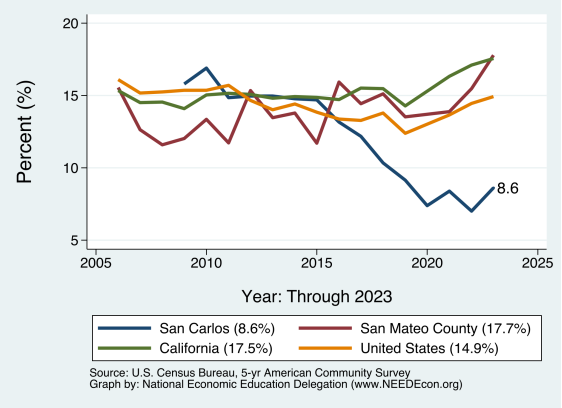


Figure 50: Renters

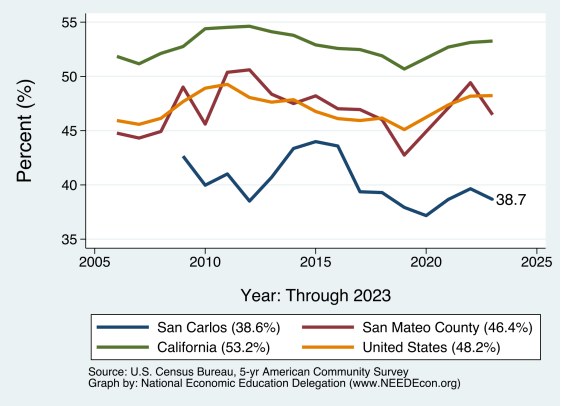
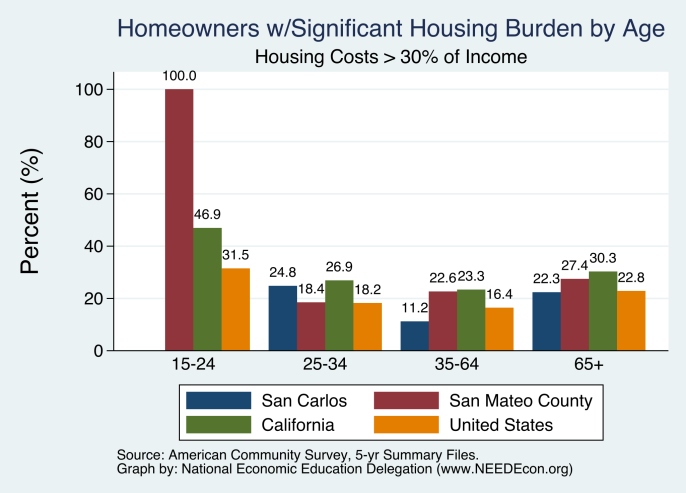


Figure 51: Homeowner Housing Burden by Age



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Housing Picture

Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. The median value is the amount in the middle. Fifty percent of units are above the median and 50 percent are below.

Why is it important?

In areas where the rate of population growth exceeds the rate of housing growth, this is likely to reflect a tightening housing market. A tightening housing market will also likely be reflected in lower vacancy rates and higher occupancy rates. It may also be reflected in higher numbers of people per household.

Table 5. Housing Market Indicators

Indicator	2024	2019	2010	% Change from 2019	% Change from 2010
Total Population	29,420.0	29,652.0	28,406.0	-0.8	3.6
Total # of Homes	12,343.0	12,095.0	12,018.0	2.1	2.7
# Occupied Units	11,887.0	11,428.0	11,524.0	4.0	3.1
Persons per Household	2.5	2.6	2.5	-4.6	0.4
Vacancy Rate (%)	3.7	5.5	4.1	-33.0	-10.1

Source: CA DOF; Calculations by the National Economic Education Delegation

Figure 52: Housing Growth

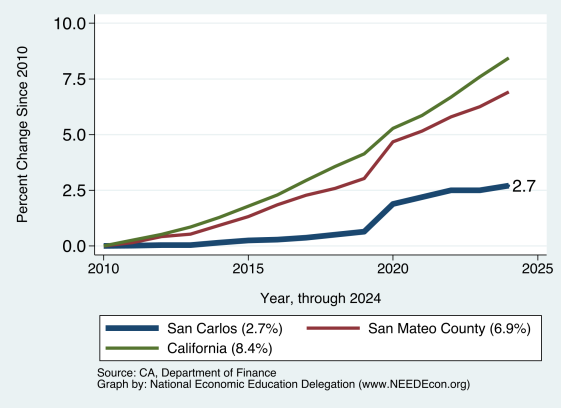


Figure 53: Persons per Household

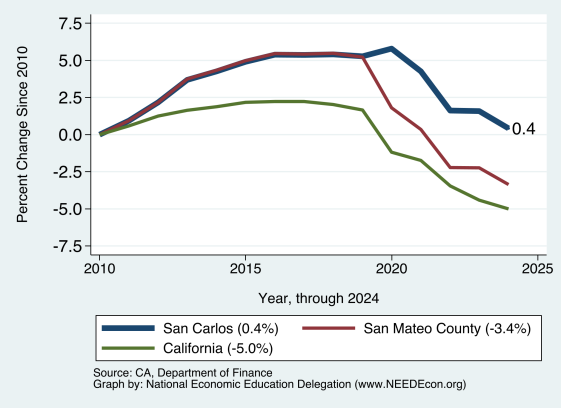


Figure 54: Vacancy Rates

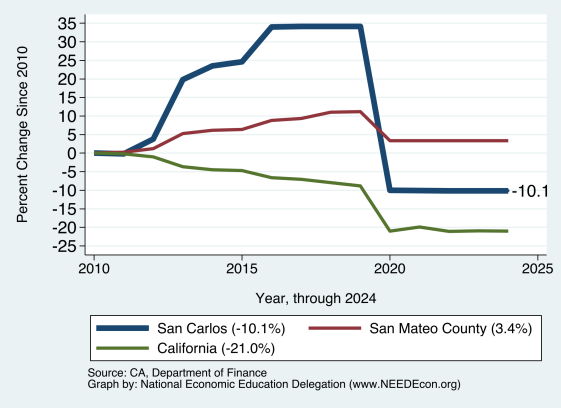
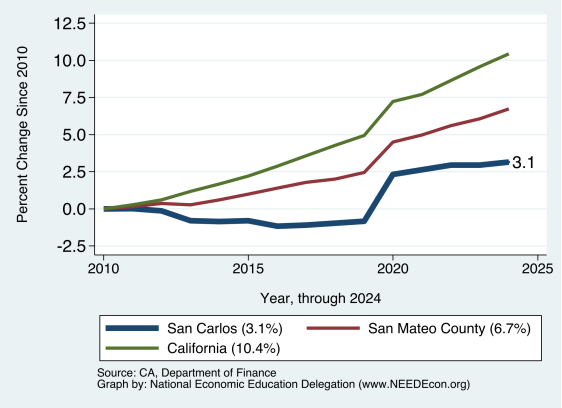


Figure 55: Number of Occupanied Units



Trends in the Growth of Housing by Housing Type

Figure 56: Single Detached Homes

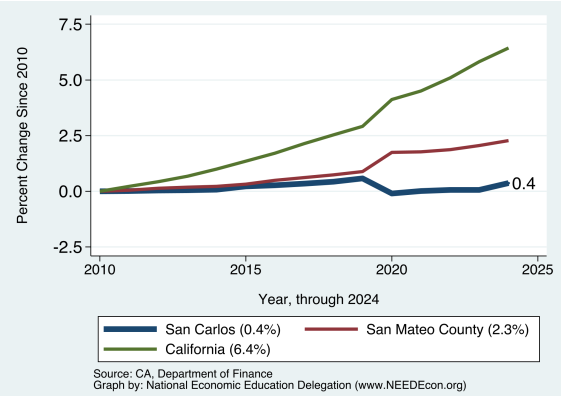


Figure 57: Single Attached Homes

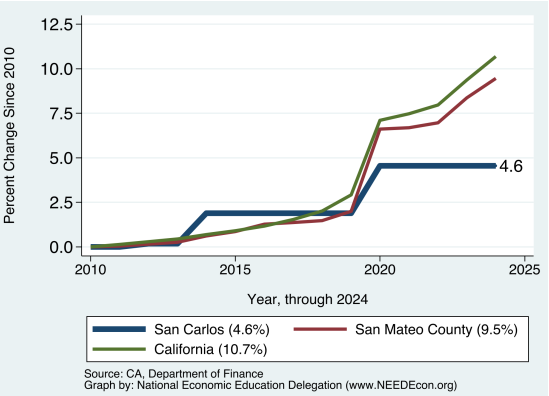


Figure 58: Housing in Buildings with Two to Four Units

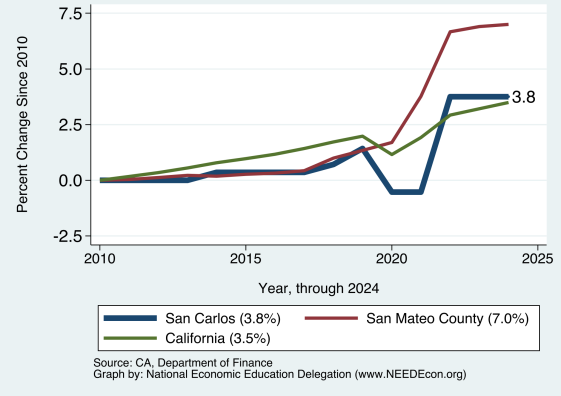
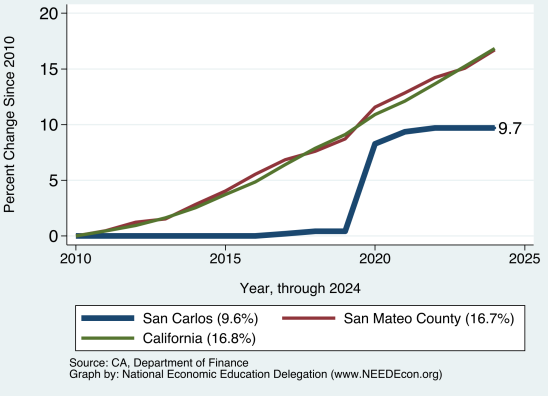


Figure 59: Housing in Buildings with Five or More Units



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Vintage of Residential Housing

Why is it important?

This section provides evidence on the year in which residential housing in San Carlos was built. We break it down into owned versus rented residences and provide a comparison across San Mateo County and broader regions. A sense of the age of housing in a region provides an indication of the urgency with which a region might pursue additional housing. As the housing stock ages, an urgency with which renovations and rebuilds are permitted might result. All things equal, more recently constructed housing will be more likely to meet current codes and standards. Remodeling of existing units will be more desirable when existing units are, on average, older.

Figure 60: Distribution of Housing Construction

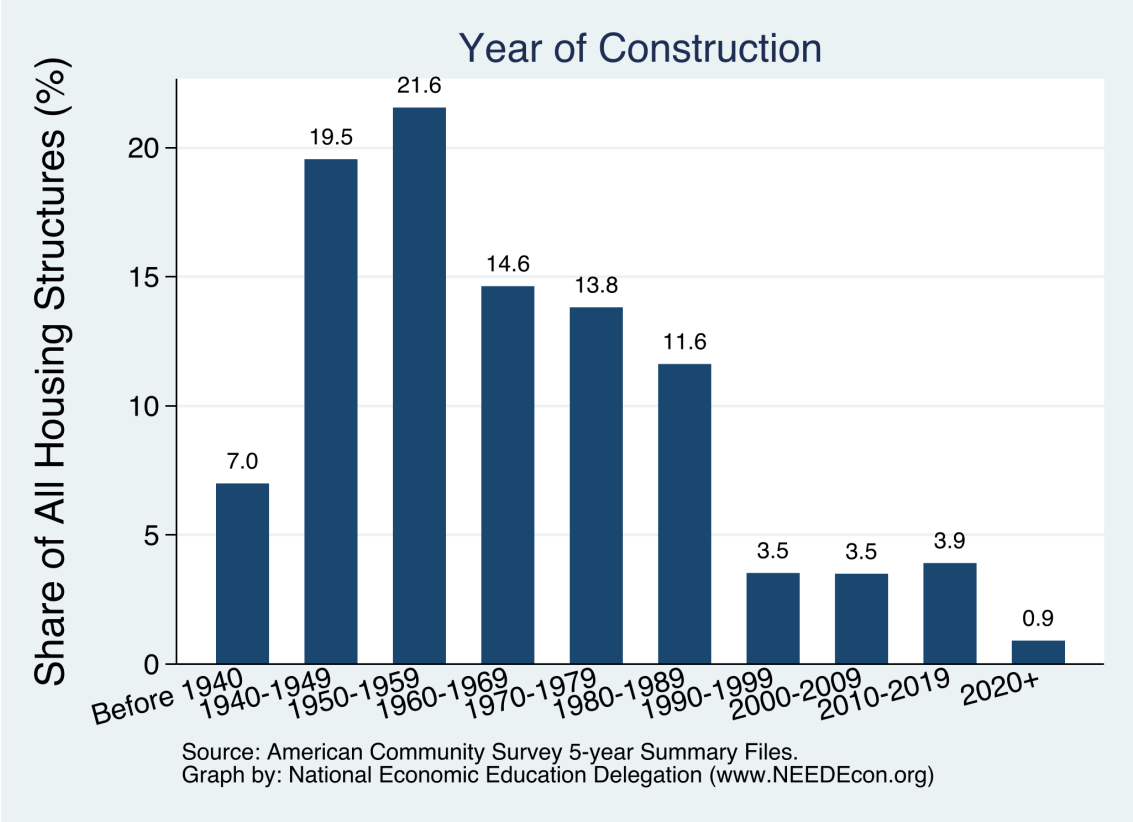


Figure 61: Housing Vintage across Regions

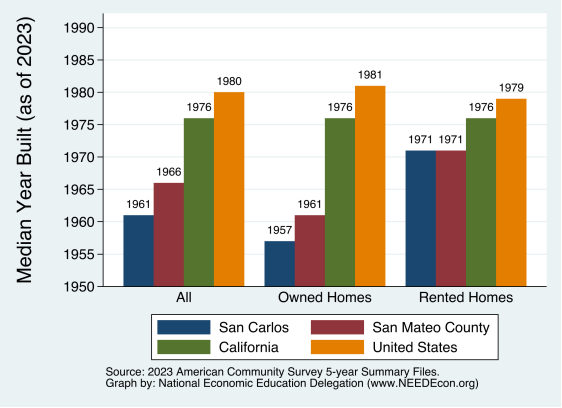


Figure 62: Housing Vintage by Tenure

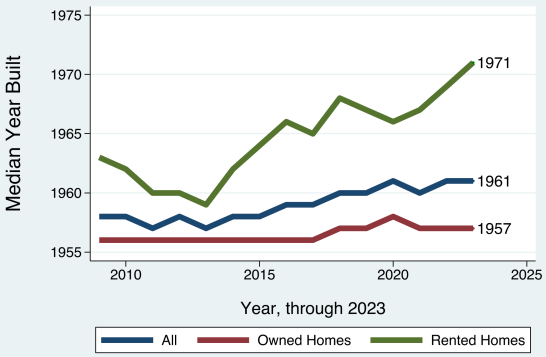


Figure 63: Vintage of Owned Residences

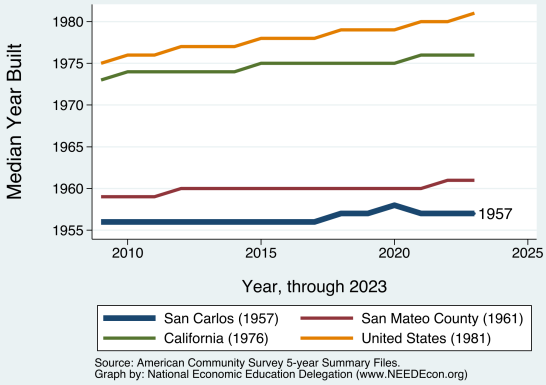


Figure 64: Vintage of Rented Residences

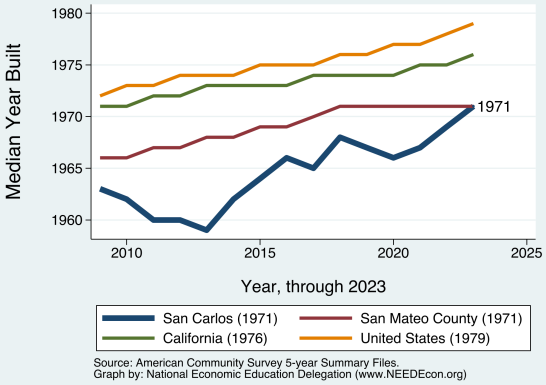
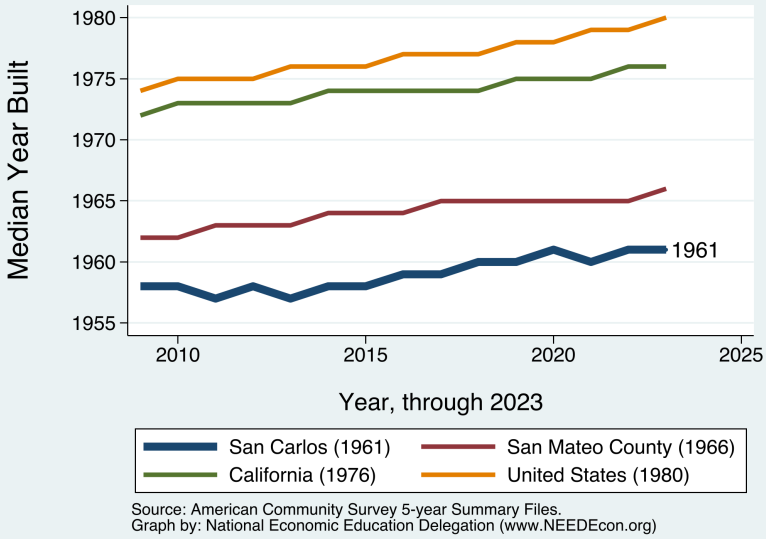


Figure 65: Vintage of All Residences



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Occupation of Residential Housing

Why is it important?

The duration of residence in a city is important for developing future policies regarding growing the local population. If a region is highly mobile, evidenced by most residences having been recently occupied, a city might propose policies to reduce that mobility, or ask why the mobility happens. Policies could be put in place to either reduce or increase migration.

Figure 66: Year Current Occupant Moved In

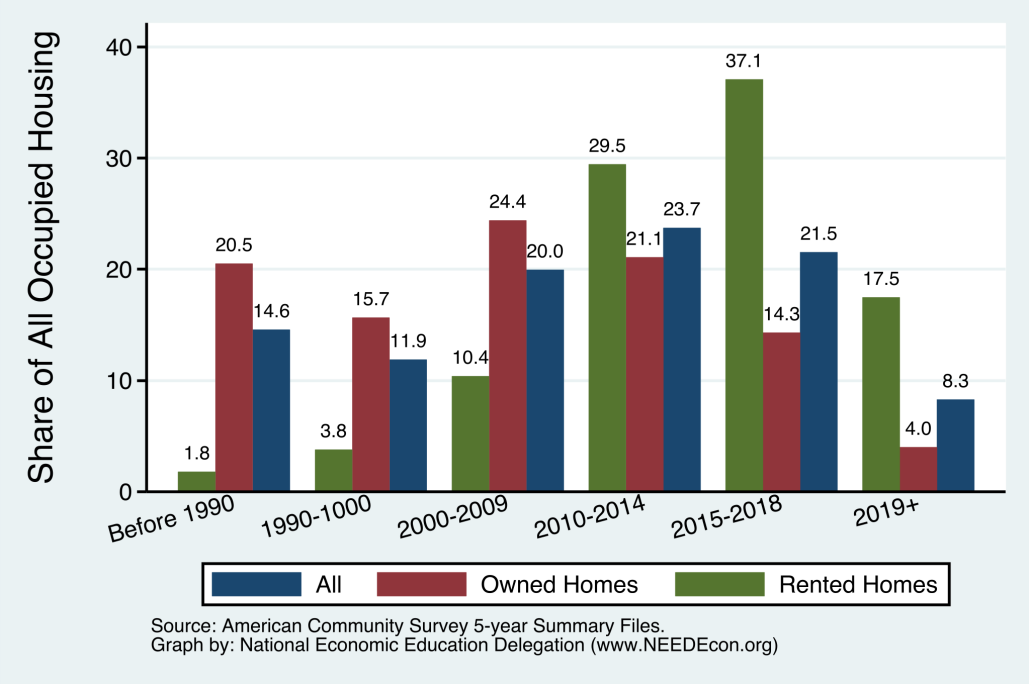


Figure 67: Year Occupied by Current Residents across Regions

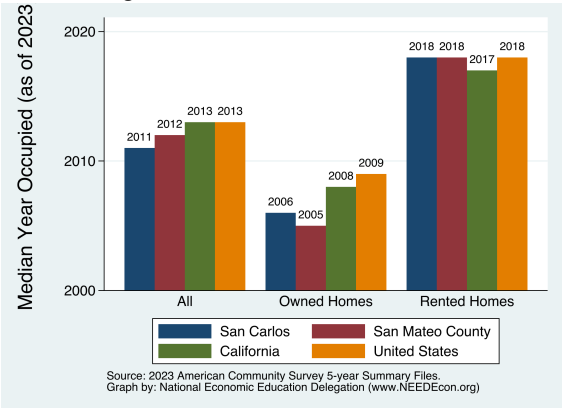


Figure 68: Year Occupied by Current Residents by Tenure

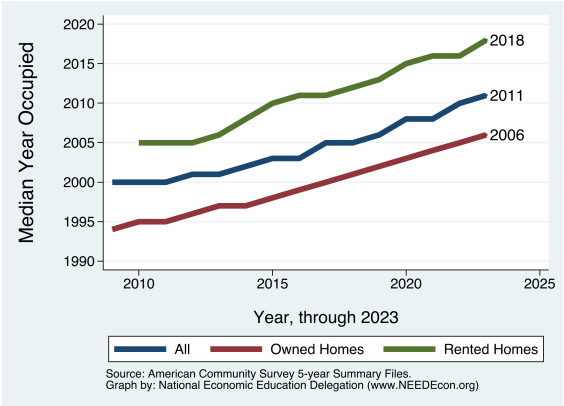


Figure 69: Year Occupied by Current Residents for Owned Housing

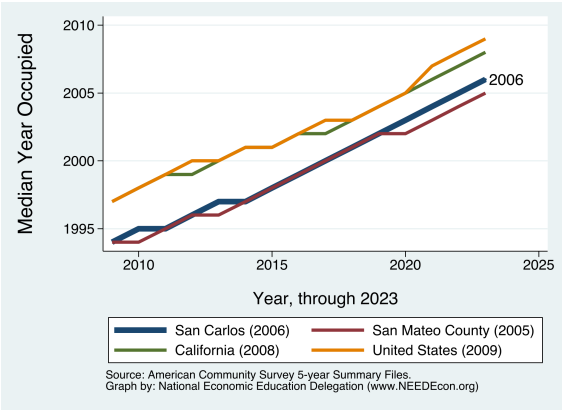


Figure 70: Year Occupied by Current Residents for Rented Housing

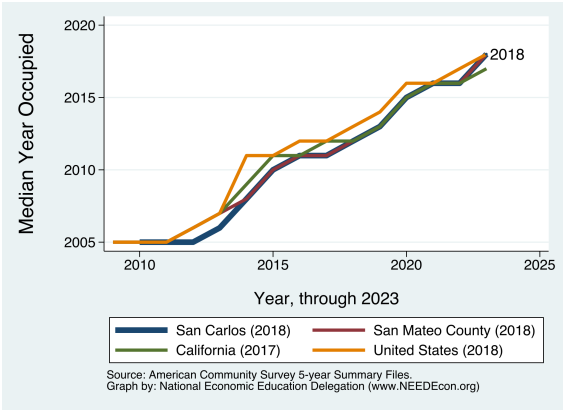
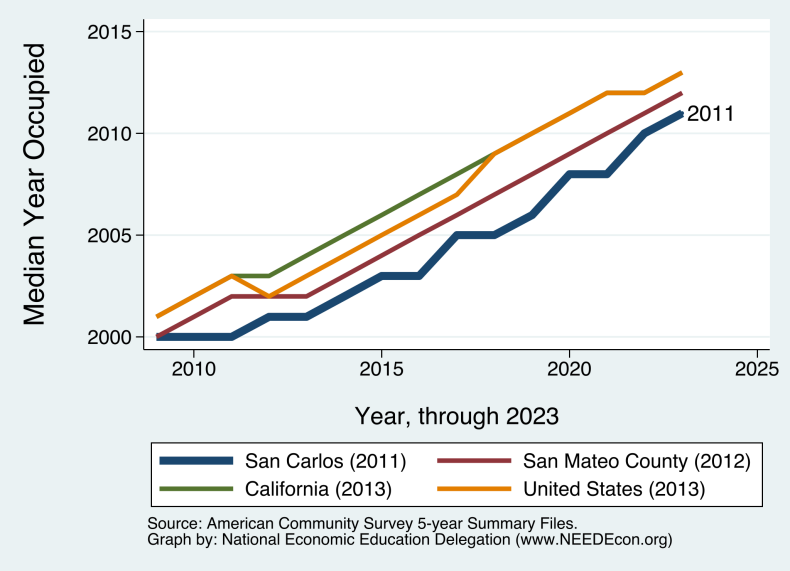


Figure 71: Year Occupied by Current Residents for All Housing



Residential Permitting

Definition:

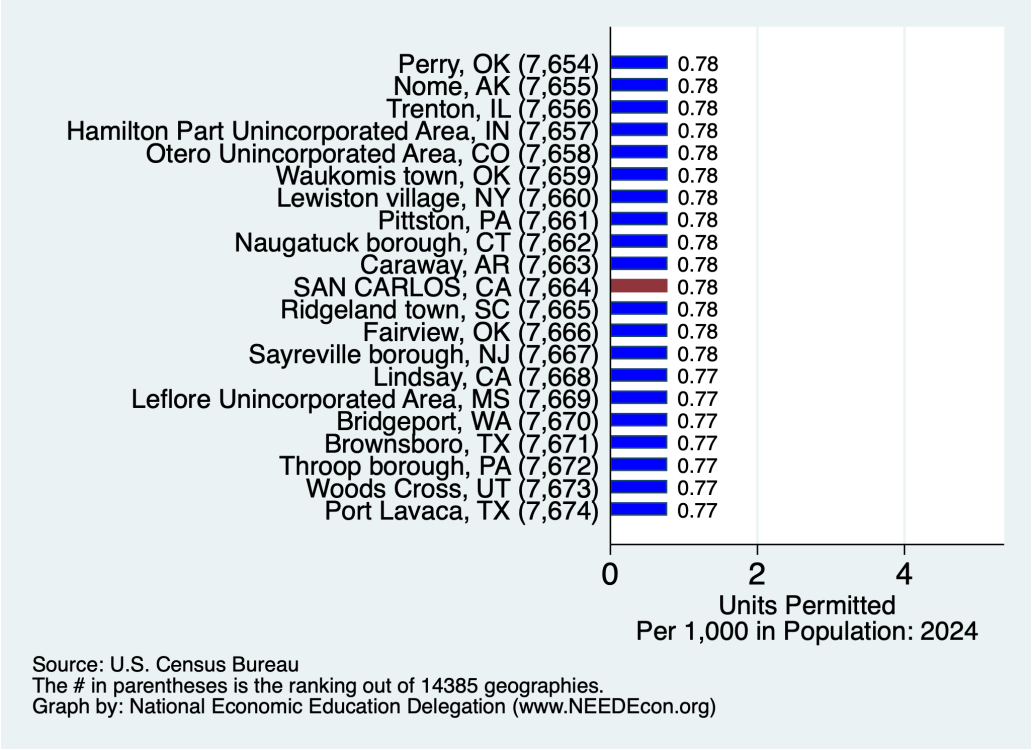
This indicator provides evidence on the number of residential buildings that are permitted for construction each year. Permit data for San Carlos is compared with data from San Mateo County as a whole and broader regions. The statistic provided scales the number of permits by population. This is done to facilitate comparisons across regions.

Why is it important?

Building permits are the best indicator available of new units coming on the market. In order for a region's population to grow and flourish, new residential properties must be added to the existing stock. Building, both in the City and in the County more generally, is an indication of the extent to which new residences accommodate new residents or are affecting prices through increased supply.

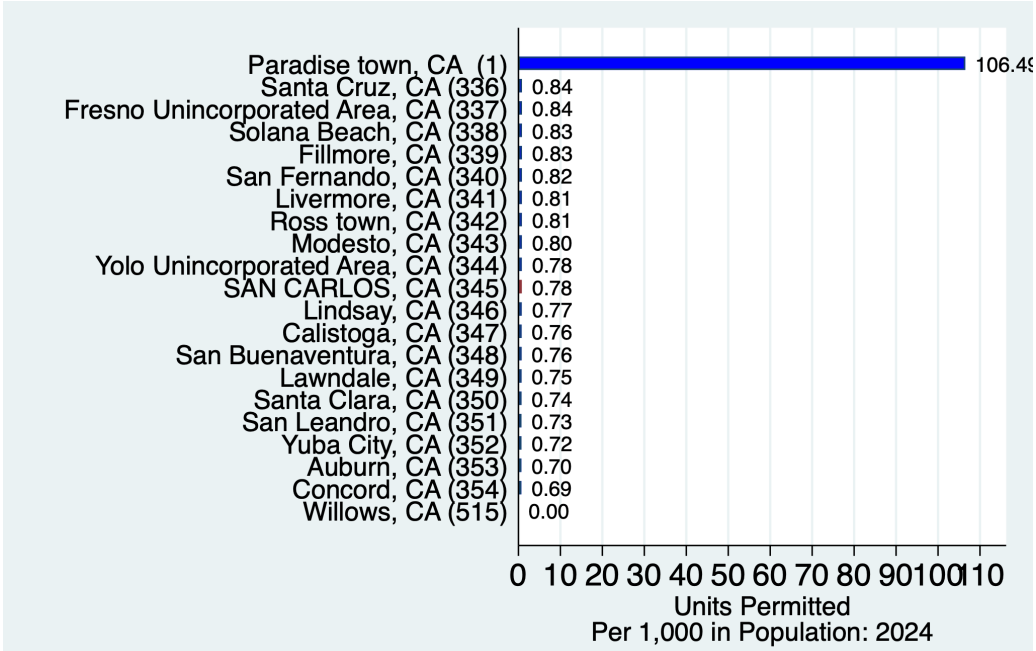
San Carlos - Ranking Among Comparables

Figure 72: Number of Units Permitted - Nationwide Comparables (Rank)



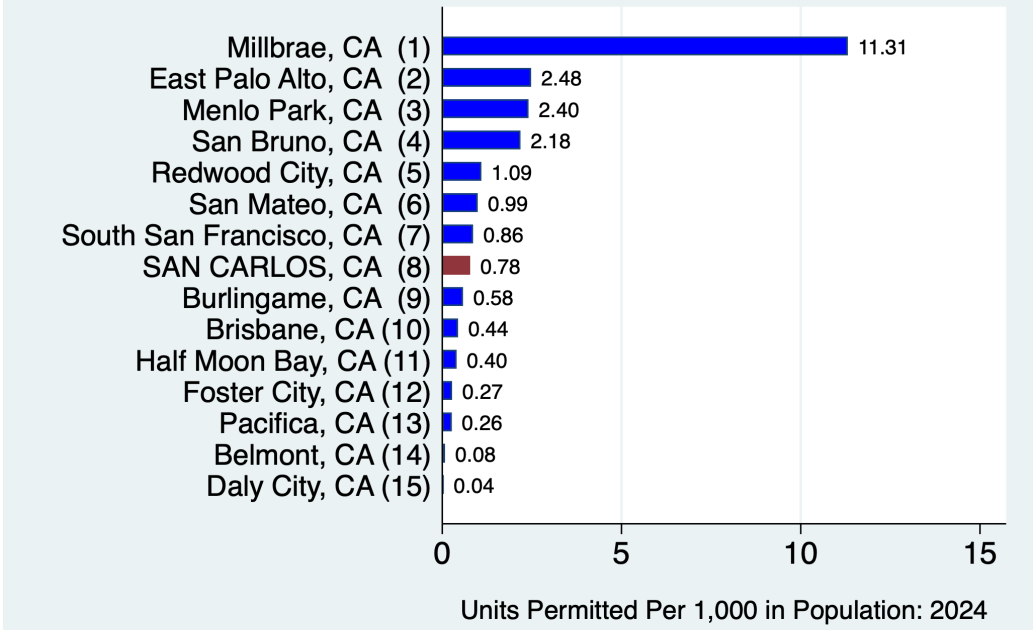
Source: U.S. Census Bureau
The # in parentheses is the ranking out of 14385 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 73: Number of Units Permitted - California Comparables (Rank)



Source: U.S. Census Bureau.
The # in parentheses is the ranking out of 515 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 74: Number of Units Permitted - Cities in San Mateo County (Rank)



Source: U.S. Census Bureau,
The # in parentheses is the ranking out of 15 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

San Carlos - Permitting Activity

Annual Units Permitted - Per Capita in San Carlos

Figure 75: Units Permitted Each Year

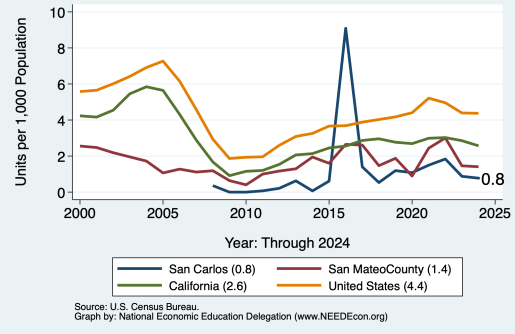
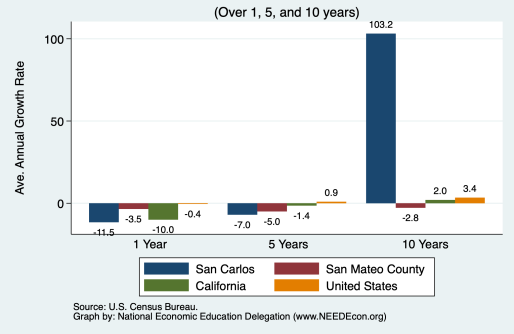


Figure 76: Average Annual Growth in Units Permitted



Annual Number of Buildings Permitted - Per Capita in San Carlos

Figure 77: Units Permitted Each Year

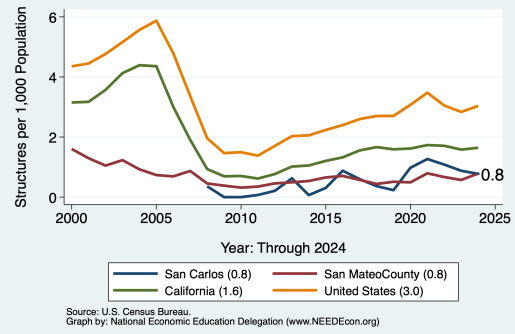
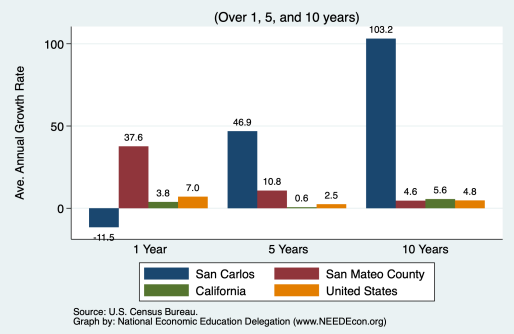


Figure 78: Average Annual Growth in Buildings Permitted



Annual Value of Property Permitted - Per Capita in San Carlos

Figure 79: Value Permitted Each Year

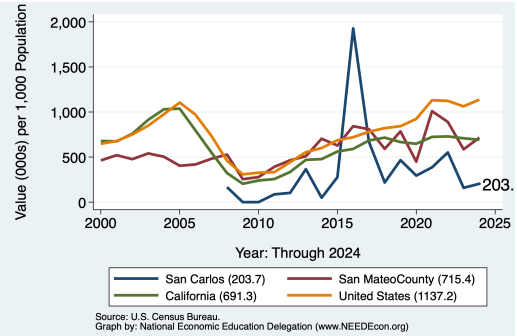
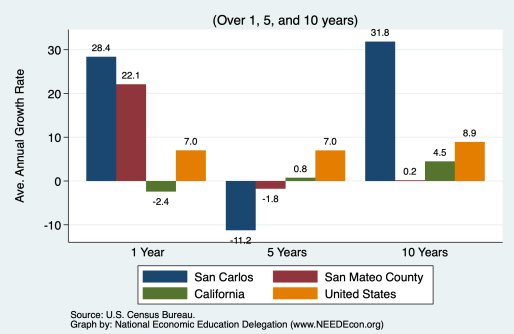


Figure 80: Average Annual Growth in Value Permitted



Commute Patterns

During the recovery from the Great Recession, the period from 2010 to 2019, the Bay Area economy, and Silicon Valley in particular, has been growing at a pace roughly double that of the state as a whole and triple that of the nation. This growth has precipitated a tight housing market and also brought about some significant changes in commute patterns, many of which have been reversed by the pandemic. Recent years have seen significant changes in both the mode of transportation and commute times.

Mode of Transportation

Figure 81: Percent of Workers Commuting by Car Alone

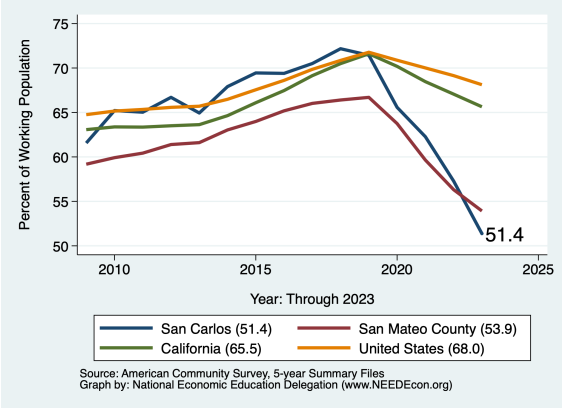


Figure 82: Percent of Workers Commuting by Carpool

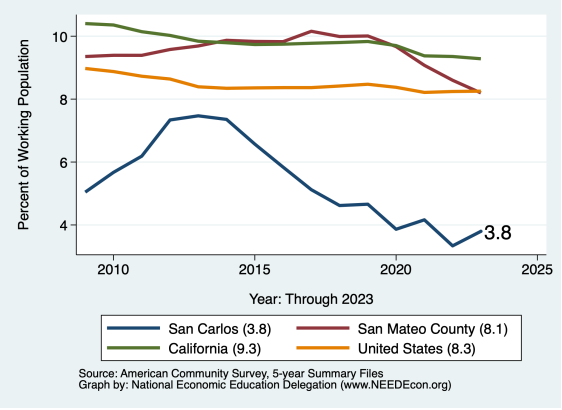


Figure 83: Percent of Workers using Public Transportation

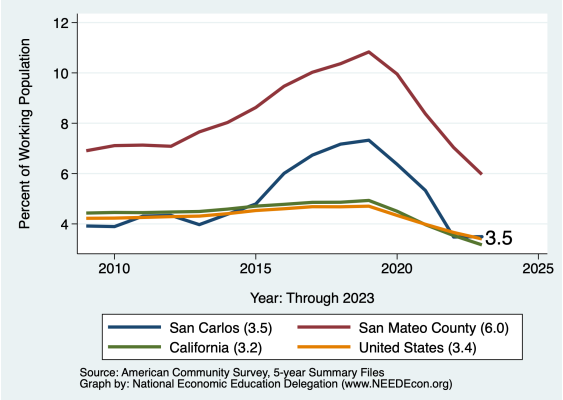
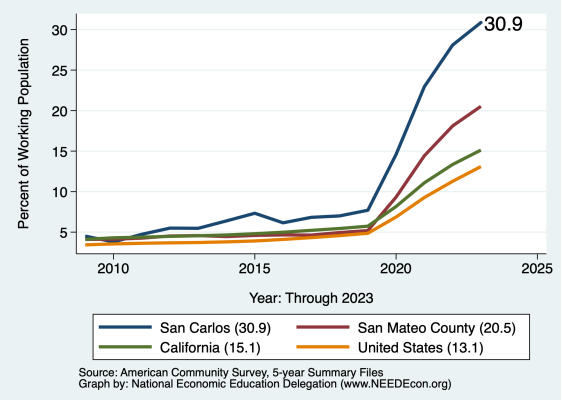


Figure 84: Percent of Workers Who Work From Home



The first table on this page presents data for those who LIVE in San Carlos. The second provides data on those who work, but do not necessarily live in San Carlos. The final two columns provide for a comparison of commute mode choices of people locally with those in California more broadly.

Table 6. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK

	Male		Female		All Workers		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van:	4,889	55.7	4,323	54.6	9,212	55.2	76.6
Drove Alone	4,553	51.9	4,025	50.8	8,578	51.4	67.1
Carpooled:	336	3.8	298	3.8	634	3.8	9.5
In 2-person carpool	275	3.1	176	2.2	451	2.7	6.8
In 3-person carpool	39	0.4	64	0.8	103	0.6	1.6
In 4-or-more-person carpool	22	0.3	58	0.7	80	0.5	1.1
Public Transportation (excl Taxi):	273	3.1	310	3.9	583	3.5	3.2
Bus or Trolley Bus	62	0.7	182	2.3	244	1.5	2.1
Streetcar or Trolley Car	57	0.6	35	0.4	92	0.6	0.6
Subway or Elevated	154	1.8	93	1.2	247	1.5	0.3
Railroad	0	0.0	0	0.0	0	0.0	0.2
Ferryboat	0	0.0	0	0.0	0	0.0	0.1
Bicycle	87	1.0	194	2.5	281	1.7	0.7
Walked	98	1.1	145	1.8	243	1.5	2.4
Taxicab, Motorcycle, or other	195	2.2	187	2.4	382	2.3	1.7
Worked at Home	2,508	28.6	2,645	33.4	5,153	30.9	15.5
Total:	8,050	91.7	7,804	98.6	15,854	95.0	

Source: 2023 5-year American Community Survey, Summary File

Table 7. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK FOR WORKPLACE GEOGRAPHY

	Male		Female		All Workers		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van:	7,637	68.4	4,891	57.7	12,528	65.5	76.6
Drove Alone	6,968	62.4	4,317	50.9	11,285	59.0	67.1
Carpooled:	669	6.0	574	6.8	1,243	6.5	9.5
In 2-person carpool	556	5.0	466	5.5	1,022	5.3	6.8
In 3-person carpool	97	0.9	50	0.6	147	0.8	1.6
In 4-or-more-person carpool	16	0.1	58	0.7	74	0.4	1.1
Public Transportation (excl Taxi):	165	1.5	119	1.4	284	1.5	3.2
Bus or Trolley Bus	45	0.4	64	0.8	109	0.6	2.1
Streetcar or Trolley Car	62	0.6	0	0.0	62	0.3	0.6
Subway or Elevated	36	0.3	55	0.6	91	0.5	0.3
Railroad	5	0.0	0	0.0	5	0.0	0.2
Ferryboat	17	0.2	0	0.0	17	0.1	0.1
Bicycle	84	0.8	33	0.4	117	0.6	0.7
Walked	109	1.0	181	2.1	290	1.5	2.4
Taxicab, Motorcycle, or other	118	1.1	91	1.1	209	1.1	1.7
Worked at Home	2,508	22.5	2,645	31.2	5,153	26.9	15.4
Total:	10,621	95.1	7,960	93.8	18,581	97.1	

Source: 2023 5-year American Community Survey, Summary File
The results in this table are for those who work in the region, regardless of the location of their residence.

Commute Times for Employed Residents

Table 8. SEX OF WORKERS BY TRAVEL TIME TO WORK

	Male		Female		All Workers		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	(%)
Less than 5 minutes	30	0.4	131	1.9	161	1.1	2.0
5 to 9 minutes	651	8.2	577	8.4	1,228	8.3	7.6
10 to 14 minutes	719	9.0	563	8.2	1,282	8.7	12.2
15 to 19 minutes	726	9.1	1,064	15.6	1,790	12.2	15.1
20 to 24 minutes	755	9.5	644	9.4	1,399	9.5	14.5
25 to 29 minutes	355	4.5	328	4.8	683	4.6	6.4
30 to 34 minutes	786	9.9	704	10.3	1,490	10.1	15.0
35 to 39 minutes	262	3.3	186	2.7	448	3.0	2.9
40 to 44 minutes	308	3.9	218	3.2	526	3.6	4.3
45 to 59 minutes	524	6.6	407	6.0	931	6.3	8.5
60 to 89 minutes	353	4.4	281	4.1	634	4.3	7.6
90 or more minutes	73	0.9	56	0.8	129	0.9	3.9
Total:	5,542	69.7	5,159	75.4	10,701	72.7	

Source: 2023 5-year American Community Survey, Summary File

Figure 85: Percent of Employed Population With Commutes of More than 30 Minutes

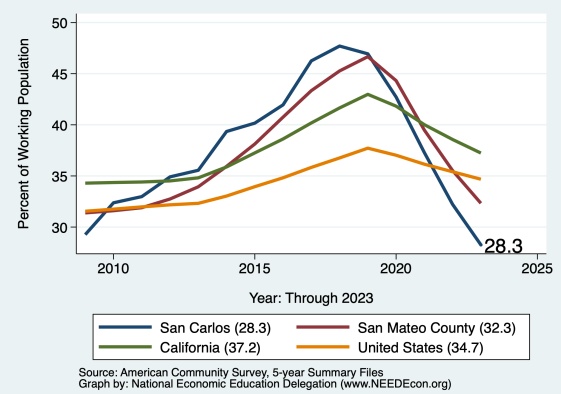


Figure 86: Percent of Employed Population With Commutes of More than 90 Minutes

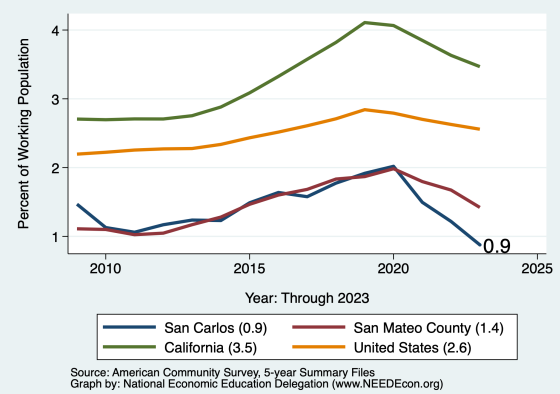
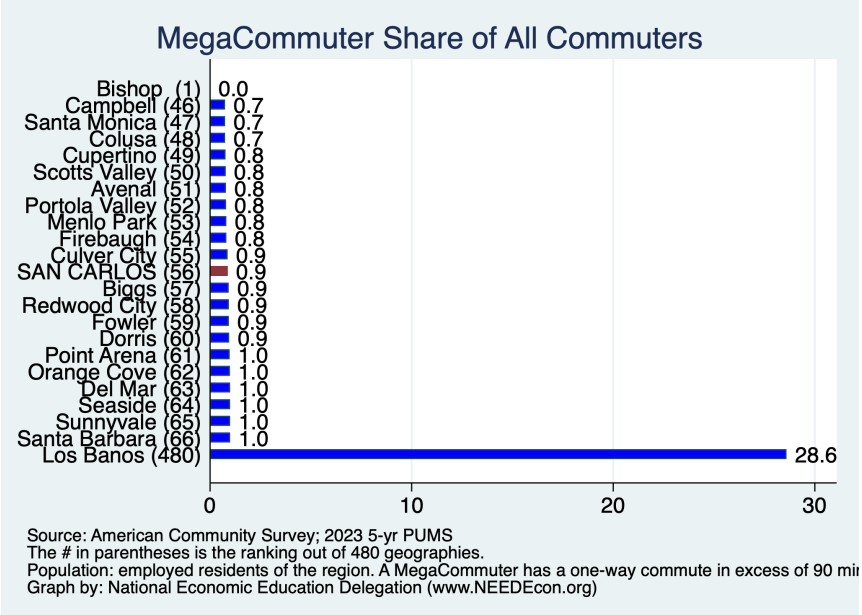


Figure 87: Rank: Share of MegaCommuters Across Similar Geographies



Commute Times for Those Employed in the City

Table 9. SEX OF WORKERS BY TRAVEL TIME TO WORK FOR WORKPLACE GEOGRAPHY

	Male		Female		All Workers		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	(%)
Less than 5 minutes	65	0.6	116	1.5	181	1.0	2.0
5 to 9 minutes	698	6.8	525	6.8	1,223	7.1	7.6
10 to 14 minutes	901	8.8	699	9.1	1,600	9.2	12.2
15 to 19 minutes	999	9.8	1,018	13.2	2,017	11.6	15.1
20 to 24 minutes	1,066	10.4	503	6.5	1,569	9.1	14.5
25 to 29 minutes	378	3.7	287	3.7	665	3.8	6.4
30 to 34 minutes	1,104	10.8	1,001	13.0	2,105	12.1	15.0
35 to 39 minutes	290	2.8	64	0.8	354	2.0	2.9
40 to 44 minutes	441	4.3	189	2.5	630	3.6	4.3
45 to 59 minutes	852	8.3	305	4.0	1,157	6.7	8.5
60 to 89 minutes	661	6.5	431	5.6	1,092	6.3	7.6
90 or more minutes	658	6.4	177	2.3	835	4.8	3.9
Total:	8,113	79.5	5,315	69.1	13,428	77.5	

Source: 2023 5-year American Community Survey, Summary File
The results in this table are for those who work in the region, regardless of the location of their residence.

Figure 88: Percent of Local Employees With Commutes of More than 30 Minutes

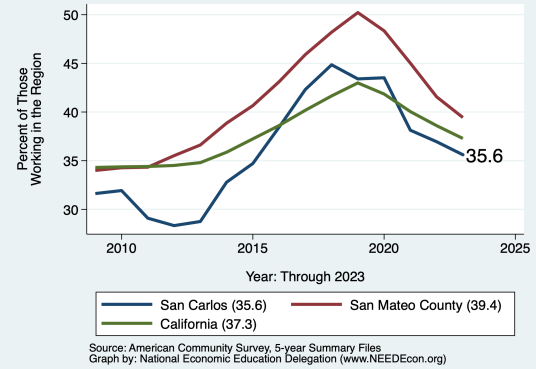


Figure 89: Percent of Local Employees With Commutes of More than 90 Minutes

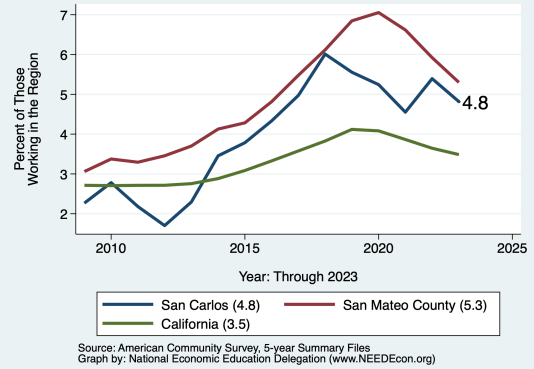
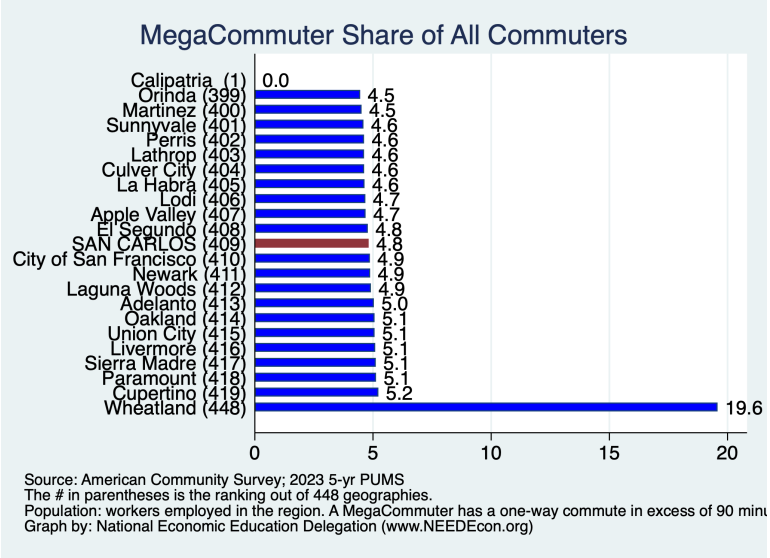


Figure 90: Rank: Share of MegaCommuters Across Similar Geographies



Place of Work

This section provides evidence on where workers living in San Carlos work. As evidenced in the first table, some of San Carlos's employed workers work in the City, but many do not. The first table and graph pair provide evidence at the county level while the second provide evidence with regard to working outside of the San Carlos city boundary.

Table 10. SEX OF WORKERS BY PLACE OF WORK–STATE AND COUNTY LEVEL

	Male		Female		All Workers		All of CA
Place of Work	#	(%)	#	(%)	#	(%)	(%)
Worked in state of residence:	7,988	91.0	7,804	98.6	15,792	94.6	99.6
Worked in county of residence	5,826	66.4	6,126	77.4	11,952	71.6	84.6
worked outside of county of residence	2,162	24.6	1,678	21.2	3,840	23.0	15.0
Worked outside state of residence	62	0.7	0	0.0	62	0.4	0.4
Total:	8,050	91.7	7,804	98.6	15,854	95.0	

Source: 2023 5-year American Community Survey, Summary File

Figure 91: Percent of Workers Employed Outside of Their County of Residence

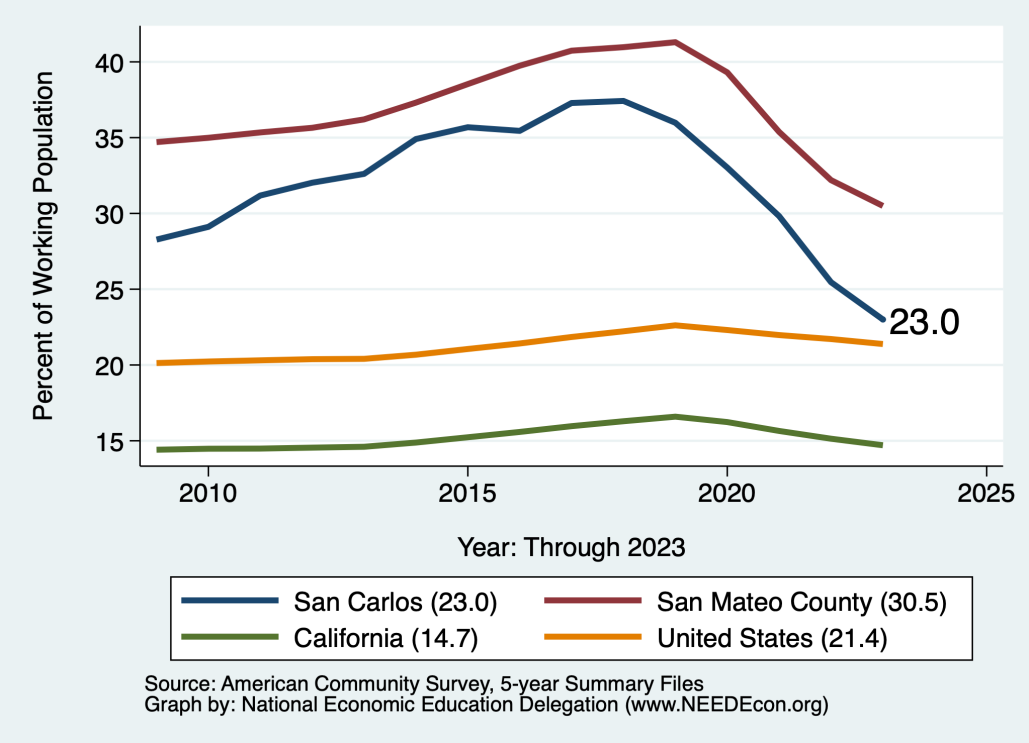
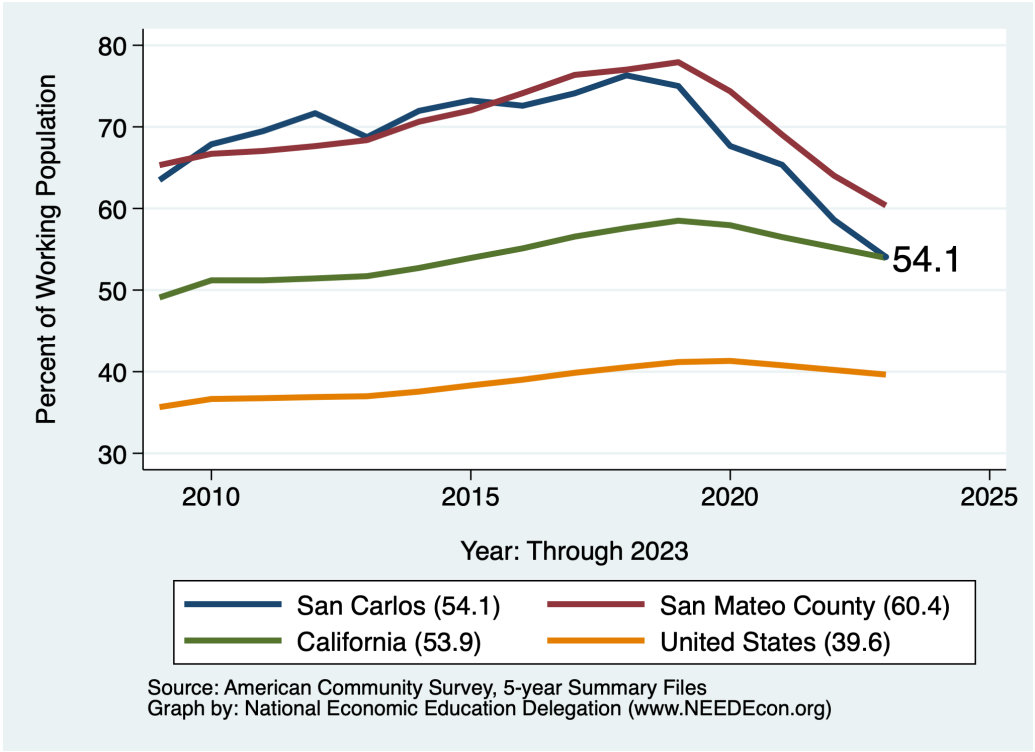


Table 11. SEX OF WORKERS BY PLACE OF WORK–PLACE LEVEL

	Male		Female		All Workers		All of CA
Place of Work	#	(%)	#	(%)	#	(%)	(%)
Living in a place:	8,050	91.7	7,804	98.6	15,854	95.0	95.9
Worked in place of residence	3,431	39.1	3,397	42.9	6,828	40.9	40.8
Worked outside place of residence	4,619	52.6	4,407	55.7	9,026	54.1	55.1
Not living in a place	0	0.0	0	0.0	0	0.0	4.1
Total:	8,050	91.7	7,804	98.6	15,854	95.0	

Source: 2023 5-year American Community Survey, Summary File

Figure 92: Percent of Workers Employed Outside of Their Place of Residence



Commute Mode by Income

Table 12. MEDIAN EARNINGS IN THE PAST 12 MONTHS BY MEANS OF TRANSPORTATION TO WORK

	City	California		United States	
	Median	*Median*	*Ratio*	*Median*	*Ratio*
Car, truck, or van - drove alone	106,985	50,877	82.1	48,079	81.5
Car, truck, or van - carpooled	86,111	37,998	88.5	36,165	87.2
Public transportation (excluding taxicab)	167,969	40,820	160.7	46,264	132.9
Walked	44,306	30,831	56.1	28,707	56.5
Taxicab, motorcycle, bicycle, or other means	167,526	41,875	156.3	38,017	161.4
Worked from home	184,462	81,088	88.8	71,072	95.0
Total:	132,164	51,620	256.0	48,394	273.1

Source: 2023 5-year American Community Survey, Summary File

Notes: 1) Ratio = the ratio of the regional median to either the CA or US median, relative to the Total ratio.
Values above 100 imply a high local median. Values below 100 imply a low local median.
For example, a value of 200 means that the local mean is 2x higher than would be expected.
For "Total:", ratio is simply the ratio of the medians.
2) For regions with more than one geography, the medians are averages weighted by working population.

Table 13. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS

	< $25,000		$25,000-$74,999		$75,000+		All		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	1,234	41.5	1,773	45.0	5,145	47.1	8,578	51.4	
Car, Truck, or Van: Carpooled	157	5.3	81	2.1	379	3.5	634	3.8	
Public Transportation (excl Taxi)	11	0.4	107	2.7	448	4.1	583	3.5	
Walked	74	2.5	70	1.8	82	0.7	243	1.5	
Taxicab, Motorcycle, or other	188	6.3	49	1.2	423	3.9	663	4.0	
Worked at Home	428	14.4	414	10.5	4,216	38.6	5,153	30.9	
Total:	2,092	70.4	2,494	63.3	10,693	97.8	15,854	95.0	

Source: 2023 5-year American Community Survey, Summary File

Table 14. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS FOR WORKPLACE GEOGRAPHY

	< $25,000		$25,000-$74,999		$75,000+		All		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	2,047	41.5	3,534	61.8	4,751	48.5	11,285	59.0	
Car, Truck, or Van: Carpooled	340	6.9	389	6.8	382	3.9	1,243	6.5	
Public Transportation (excl Taxi)	26	0.5	52	0.9	143	1.5	284	1.5	
Walked	104	2.1	70	1.2	90	0.9	290	1.5	
Taxicab, Motorcycle, or other	57	1.2	24	0.4	214	2.2	326	1.7	
Worked at Home	428	8.7	414	7.2	4,216	43.0	5,153	26.9	
Total:	3,002	60.8	4,483	78.4	9,796		18,581	97.1	

Source: 2023 5-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

Commute Mode by Poverty Status

Table 15. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS

	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	141	38.7	137	32.5	8,300	51.4	8,578	51.4	
Car, Truck, or Van: Carpooled	18	4.9	23	5.5	593	3.7	634	3.8	
Public Transportation (excl Taxi)	0	0.0	11	2.6	572	3.5	583	3.5	
Walked	7	1.9	37	8.8	199	1.2	243	1.5	
Taxicab, Motorcycle, or other	0	0.0	39	9.2	624	3.9	663	4.0	
Worked at Home	41	11.3	5	1.2	5,107	31.6	5,153	30.9	
Total:	207	56.9	252	59.7	15,395	95.3	15,854	95.0	

Source: 2023 5-year American Community Survey, Summary File

Table 16. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS FOR WORKPLACE GEOGRAPHY

	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	340	53.7	445	49.9	10,497	58.1	11,282	59.0	
Car, Truck, or Van: Carpooled	6	0.9	67	7.5	1,170	6.5	1,243	6.5	
Public Transportation (excl Taxi)	6	0.9	3	0.3	275	1.5	284	1.5	
Walked	49	7.7	12	1.3	229	1.3	290	1.5	
Taxicab, Motorcycle, or other	0	0.0	11	1.2	315	1.7	326	1.7	
Worked at Home	41	6.5	5	0.6	5,107	28.3	5,153	27.0	
Total:	442	69.8	543	60.9	17,593	97.4	18,578	97.2	

Source: 2023 5-year American Community Survey, Summary File
The results in this table are for those who work in the region, regardless of the location of their residence.

Migration

Overall Migration Flows

Definition:

The United States is a country with an increasingly mobile population. People move, migrate, from one place to another with increasing frequency.

Why is it important?

Having a handle on whether or not San Carlos is a net recipient (migration inflows) or donor (migration outflows) of population is very important for understanding trends in the City's development. This section outlines migration patterns by age, education, income, marital status, and housing tenure. Understanding recent trends is very important for making policy, investment, and other decisions about the future. Also, understanding the extent to which the population is stable, or experiences significant turnover each year is helpful for planning purposes.

Figure 93: Overall Movements of Residents

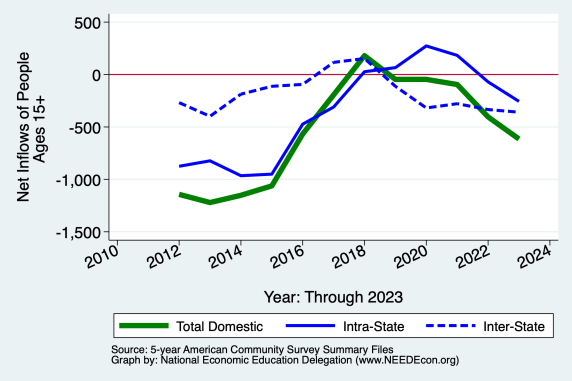


Table 17: Migration by Income

		Net Inflows				
			Same State			
Category	Population	All Migration	W/in County	Between Counties	Across States	From Abroad
No income	2,527	−64	−18	−58	−27	39
With income	21,558	−423	252	−432	−332	89
$1 to $9,999 or loss	2,086	−86	46	−3	−163	34
$10,000 to $14,999	585	−46	−10	−36	0	0
$15,000 to $24,999	1,182	−59	−58	33	−46	12
$25,000 to $34,999	1,088	23	−32	7	48	0
$35,000 to $49,999	1,164	−210	7	−96	−131	10
$50,000 to $64,999	1,692	157	105	−52	87	17
$65,000 to $74,999	907	−49	−41	−8	0	0
$75,000 or more	12,854	−153	235	−277	−127	16
All:	24,085	−487	234	−490	−359	128

Source: 2023 5-year American Community Survey, Summary File
Note: The data in this and other tables in this section are limited in that there is no information on the City's population that has moved abroad.
The "From Abroad" column is gross movements into the City from abroad.

Figure 94: Overall Movements of Low Income Residents

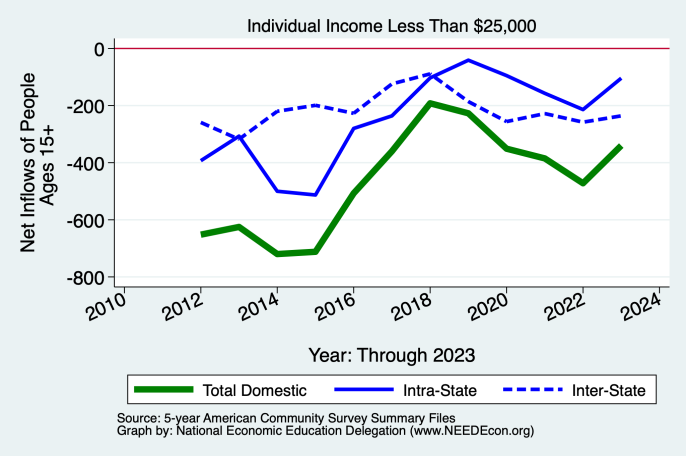


Figure 95: Overall Movements of Middle Income Residents

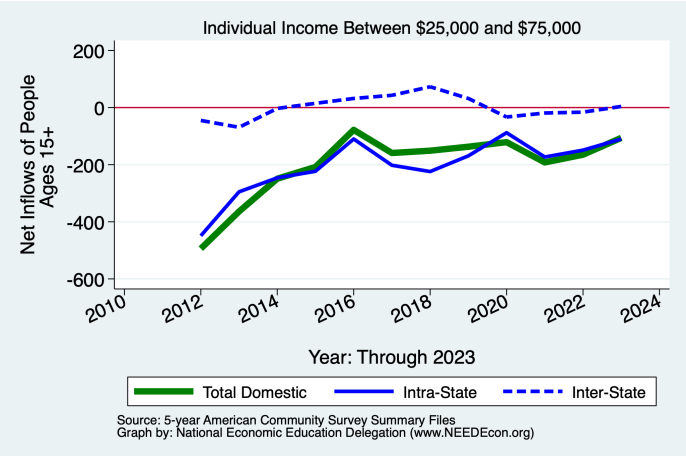
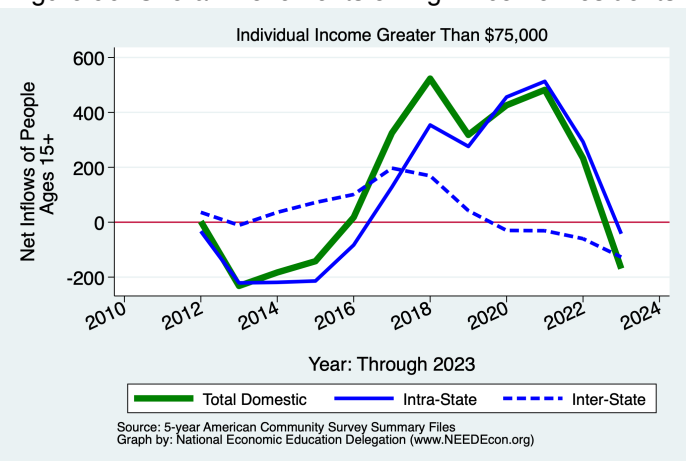


Figure 96: Overall Movements of High Income Residents



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Demographics of Migration Flows

Table 18: Migration by Marital Status

Category	Population	Net Inflows: All Migration	Net Inflows: Same State: W/in County	Net Inflows: Same State: Between Counties	Net Inflows: Across States	Net Inflows: From Abroad
Never married	5,953	−326	249	−339	−253	17
Now married, except separated	14,718	−333	−62	−229	−143	101
Divorced	2,032	104	71	55	−22	0
Separated	256	33	6	27	0	0
Widowed	1,126	35	−30	−4	59	10
Total:	24,085	−487	234	−490	−359	128

Source: 2023 5-year American Community Survey, Summary File

Table 19: Migration by Tenure

Category	Population	Net Inflows: All Migration	Net Inflows: Same State: W/in County	Net Inflows: Same State: Between Counties	Net Inflows: Across States	Net Inflows: From Abroad
Householder lived in owner-occupied housing units	21,384	−400	161	−317	−289	45
Householder lived in renter-occupied housing units	7,811	−23	29	−138	−28	114
Total:	29,195	−423	190	−455	−317	159

Source: 2023 5-year American Community Survey, Summary File

Figure 97: Domestic Movements of Residents by Tenure

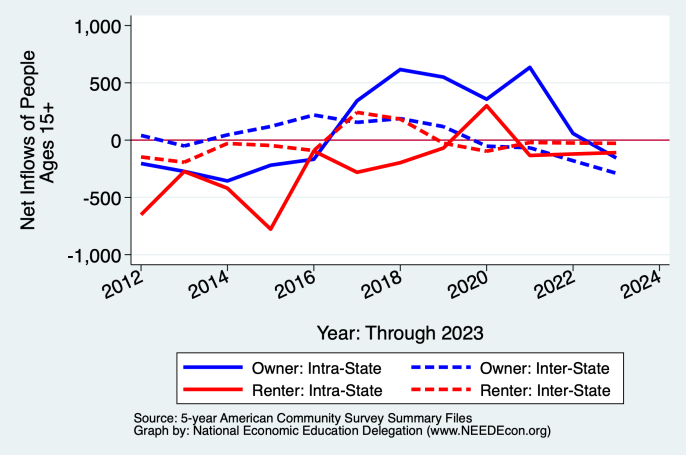

Table 20: Migration by Age

Category	Population	Net Inflows				
			Same State			
		All Migration	W/in County	Between Counties	Across States	From Abroad
1 to 4 years	1,097	−20	72	−65	−41	14
5 to 17 years	5,556	−155	−122	−37	−13	17
18 and 19 years	415	−234	0	−76	−158	0
20 to 24 years	1,130	45	58	19	−32	0
25 to 29 years	1,302	−89	63	−188	7	29
30 to 34 years	1,612	−99	173	−172	−100	0
35 to 39 years	2,658	−60	38	−58	−69	29
40 to 44 years	2,196	66	−15	27	54	0
45 to 49 years	2,101	2	−19	10	11	0
50 to 54 years	2,296	−31	−21	−10	0	0
55 to 59 years	2,340	−45	−55	2	0	8
60 to 64 years	1,707	−12	63	0	−91	16
65 to 69 years	1,535	2	−14	9	−2	9
70 to 74 years	1,327	55	−5	−2	44	18
75 years and over	2,050	−25	−26	5	−23	19
Total Population:	29,322	−600	190	−536	−413	159

Source: 2023 5-year American Community Survey, Summary File

Table 21: Migration by Educational Attainment

Category	Population	Net Inflows				
			Same State			
		All Migration	W/in County	Between Counties	Across States	From Abroad
Less than high school graduate	704	−22	−19	−3	0	0
High school graduate (includes equiv)	1,631	−156	−162	−20	8	18
Some college or assoc. degree	4,410	39	126	−93	−24	30
Bachelor's degree	6,424	−307	111	−235	−193	10
Graduate or professional degree	7,955	210	126	−26	40	70
Total:	21,124	−236	182	−377	−169	128

Source: 2023 5-year American Community Survey, Summary File

Table 22: Median Income of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	106,316	106,316
Moved Within Same County	112,679	103,903
Moved to Different County, Same State	0	88,750
Moved Between States	56,816	38,944
Moved from Abroad	0	
Total Population:	105,773	104,651

Source: 2023 5-year American Community Survey, Summary File

Table 23: Median Age of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	44.1	44.1
Moved Within Same County	34.5	36.8
Moved to Different County, Same State	29.2	29.0
Moved Between States	38.9	33.3
Moved from Abroad	37.7	
Total Population:	42.2	41.3

Source: 2023 5-year American Community Survey, Summary File

References and Sources

The majority of the data presented in this report are from the American Community Survey (ACS). For larger geographies, the 1-year Summary Files provide the data. For smaller communities, roughly those with less than 65,000 in population in 2021, the 5-year Summary Files provide the data.

The ACS data are supplemented by building permit data from the U.S. Census Bureau, population and housing data from the California Department of Finance, and home price and rental rates from Zillow.

U.S. Census Bureau. American Community Survey 1-year and 5-year Summary Files. https://www.census.gov/programs-surveys/acs/data/data-via-ftp.html. The 1-year data are released in September each year and the 5-year data are relased in January.

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