Mill Valley, California

Indicators Report

by
The National Economic Education Delegation (NEED)

April 20, 2024

Exploring the economics, demographics, and well-being of Mill Valley 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 Mill Valley (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 Mill Valley. These indicators are compared to Marin County (the County) as a whole, a broader region where one is well defined, California, and the United Sates.

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 Mill Valley 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 Mill Valley 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 Mill Valley, 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 Mill Valley, but do not necessarily live in Mill Valley.
- **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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Contents

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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 Mill Valley's population are fundamental indicators of the city's growth potential.

A Demographic Snapshot

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Statistic	2022	2019
POPULATION		
Population Estimate (#, 5yr)	14,199.0	14,330.0
Veterans (#, 5yr)	394.0	620.0
Foreign born persons (%, 5yr)	16.6	13.0
Population age 25+ (#, 5yr)	10,400.0	10,762.0
AGE AND SEX		
Persons under 5 years (%, 5yr)	3.7	3.9
Persons under 18 years (%, 5yr)	21.3	22.2
Persons 65 years and over (%, 5yr)	21.3	23.7
Female persons (%, 5yr)	53.0	54.0
INCOME AND POVERTY		
Median household income ($, 5yr)	202,986.0	163,614.0
Per capita income in past 12 months ($, 5yr)	120,154.0	119,701.0
Persons in poverty (%, 5yr)	4.6	5.6
Children age less than 18 in poverty (#, 5yr)	102.0	180.0
Children age less than 18 in poverty (%, 5yr)	3.4	5.7
RACE AND ETHNICITY		
White alone (%, 5yr)	83.6	89.1
African American alone (%, 5yr)	1.7	1.2
American Indian or Alaska Native alone (%, 5yr)	0.0	0.0
Asian alone (%, 5yr)	7.8	5.0
Native Hawaiian and Other Pacific Islander alone (%, 5yr)	0.0	0.0
Two or More Races (%, 5yr)	5.7	4.6
Hispanic or Latino (%, 5yr)	2.7	4.2
White alone, not Hispanic or Latino (%, 5yr)	82.7	86.2
HOUSING		
Housing units (#, 5yr)	6,324.0	6,628.0
Owner-occupied housing units (%, 5yr)	66.1	70.2
Median value of owner-occupied housing units ($, 5yr)	2,000,001.0	1,598,700.0
Median selected monthly owner costs-with a mortgage ($, 5yr)	4,001.0	4,001.0
Median selected monthly owner costs-without a mortgage ($, 5yr)	1,501.0	1,246.0
Median gross rent ($, 5yr)	2,988.0	2,270.0
FAMILIES AND LIVING ARRANGEMENTS		
Households (#, 5yr)	5,592.0	6,107.0
Persons per household (#, 5yr)	2.5	2.3
Living in same house 1 year ago, % of persons age 1+ (5yr)	86.4	86.6
EDUCATION		
High school graduate or higher, % of persons age 25+ (5yr)	99.0	98.6
Bachelor's degree or higher, % of persons age 25+ (5yr)	75.9	76.5
HEALTH		
With a disability, under age 65 years (#, 5yr)	357.0	479.0
Persons without health insurance, under age 65 years (%, 5yr)	1.9	0.7
LABOR FORCE		
In civilian labor force, persons age 16+ (%, 5yr)	61.4	60.5
In civilian labor force, women age 16+ (%, 5yr)	50.9	51.8
Employed, persons age 16+ (%, 5yr)	55.3	56.7
Self employed (%, 5yr)	18.6	21.9
TRANSPORTATION		
Mean travel time to work, workers age 16+ (Mins., 5yr)	22.8	29.5
Drive alone in private vehicle (%, 5yr)	54.0	63.3
Using public transportation (%, 5yr)	10.3	19.4
Worked from home (%, 5yr)	28.9	16.1

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	2023 Population	% Change 1 Year	3 Year	5 Year
City				
Mill Valley	13,664	−1.11	−6.56	−6.85
County and Broader Regions				
Marin County	252,959	−0.98	−2.85	−3.75
Bay Area	7,548,792	−0.45	−2.58	−2.62
California	38,940,231	−0.35	−1.79	−2.01

Source: CA DOF; Calculations by National Economic Education Delegation

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

City	2022	2023	% Change Local	Bay Area	California
Marin County	255.5	253.0	−0.98	−0.45	−0.35
San Rafael	60.2	59.7	−0.92		
Novato	51.9	51.4	−1.05		
Mill Valley	13.8	13.7	−1.11		
Larkspur	12.7	12.6	−1.23		
San Anselmo	12.5	12.4	−0.88		
Corte Madera	10.0	9.9	−0.82		
Tiburon	8.9	8.8	−1.18		
Fairfax	7.4	7.4	−0.76		
Sausalito	7.0	6.9	−1.29		
Ross	2.3	2.3	−0.57		
Belvedere	2.1	2.0	−1.59		

Source: CA DOF; Calculations by National Economic Education Delegation

Figure 1: Population Growth (1)

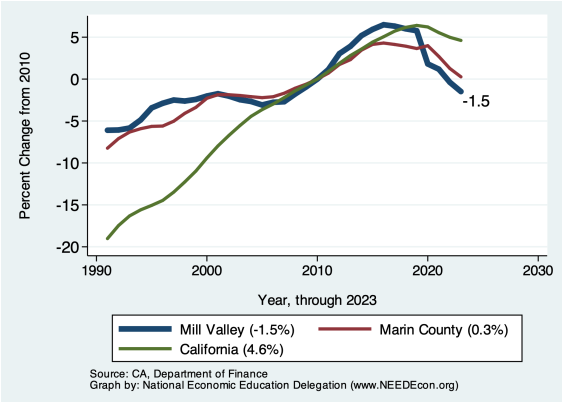

Figure 2: Population Growth (2)

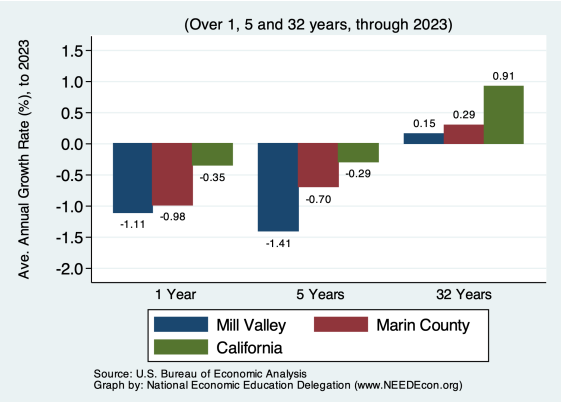

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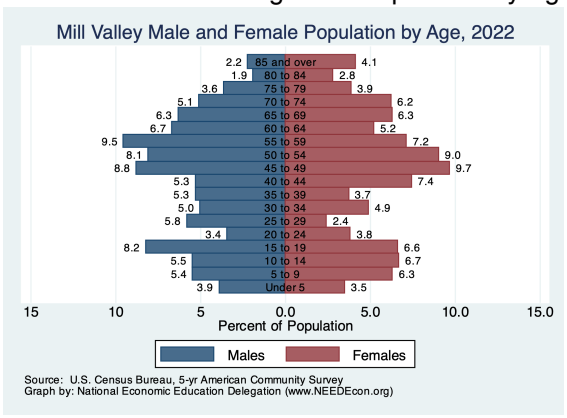
Figure 3: Population by Age - Detailed Age Categories



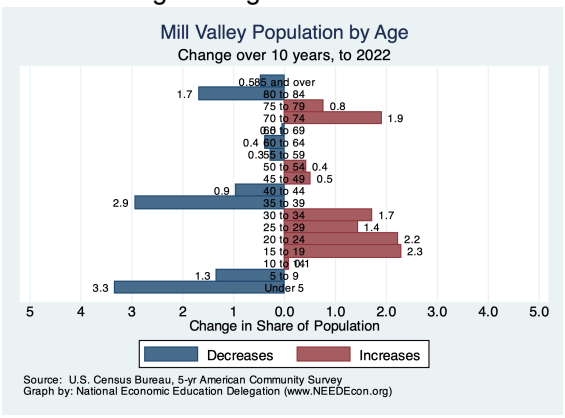
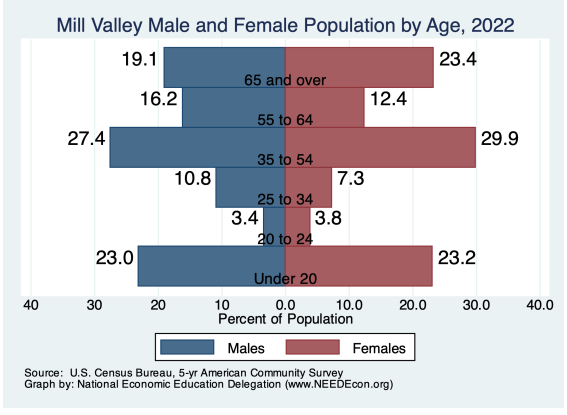


Figure 4: Population by Age - Broad Age Categories



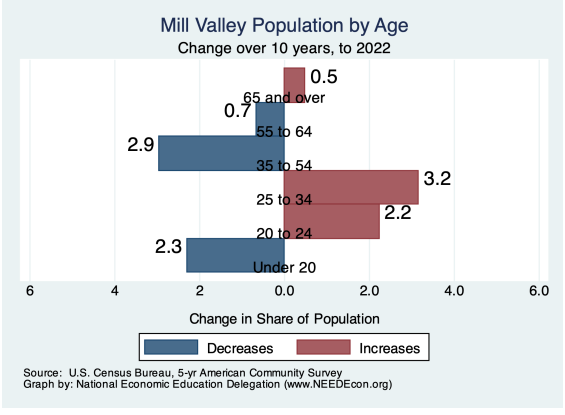
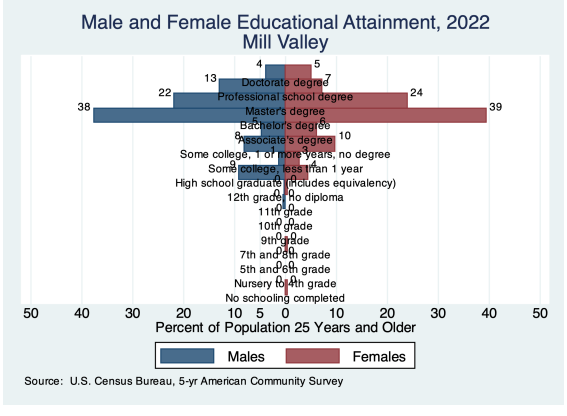


Figure 5: Population by Educational Attainment



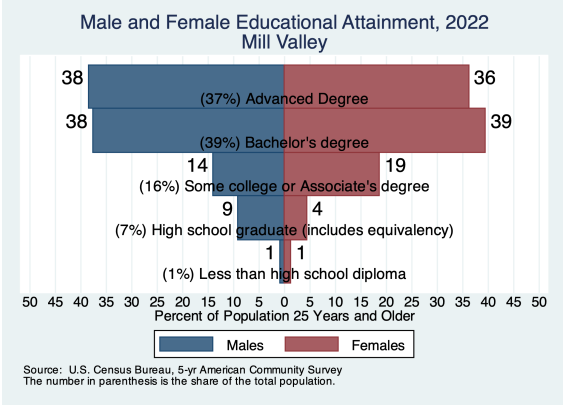


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Figure 6: Population by Race/Ethnicity

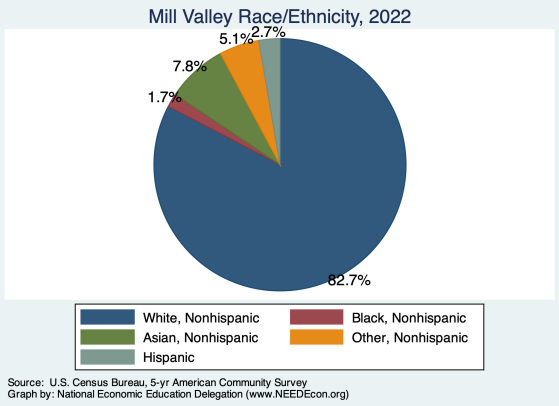
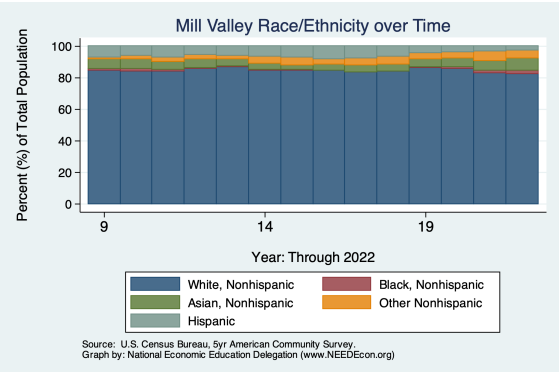


Figure 7: Population by Race/Ethnicity Over Time



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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. Mill Valley Summary for March, 2024

Category	Current Value	Change From: Last Month	Change From: 2 Months Ago	Change From: Last Year
Employment	8,924	-30	−53	-103
Labor Force	9,644	9	15	96
Number Unemployed	678	-4	21	97
Unemployment Rate	7.0	-0.0	0.2	0.9

Source: EDD, National Economic Education Delegation

Figure 8: Historical Employment and Unemployment

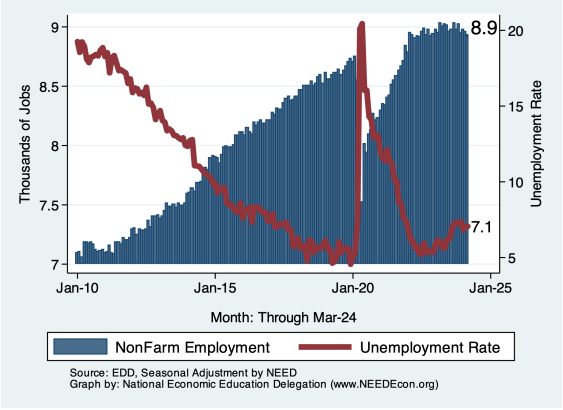


Figure 9: Employment and Unemployment - Last 12 Months

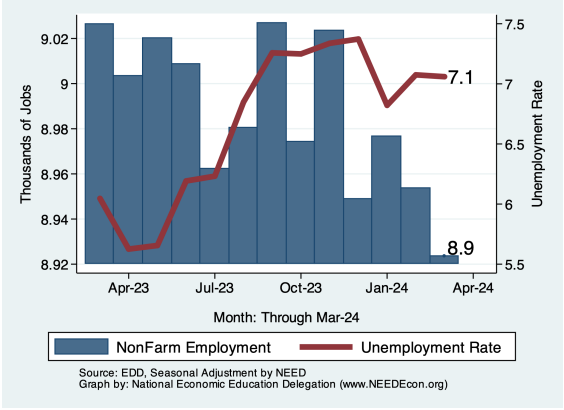


Figure 10: Relative Employment Growth Across Regions - since 2010

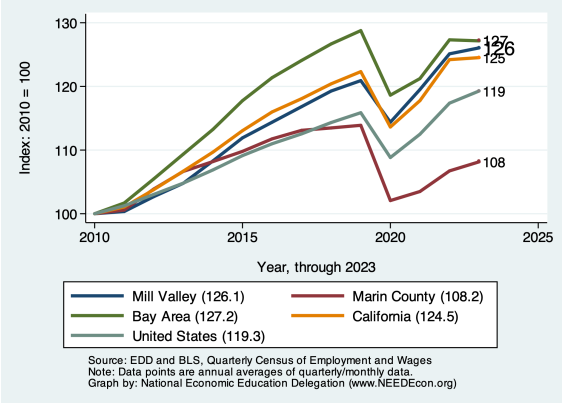
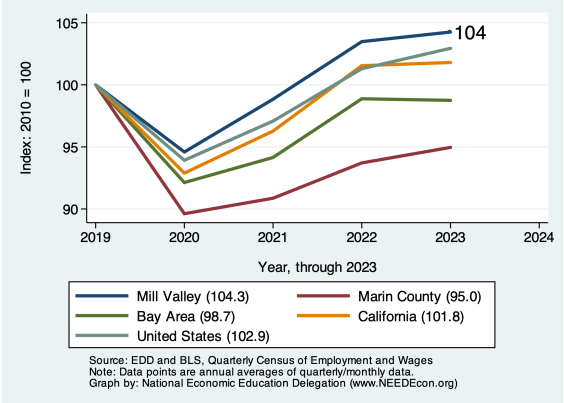


Figure 11: Relative Employment Growth Across Regions - since 2019



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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 Marin County. The following table provides the latest data for the County.

Table 4. Employment Growth by Industry in Marin County for March, 2024

			Empl	% Growth - Annualized Rate					
Industry	**Employment**	**Share**	**Growth**	**Month**	**Qtr**	**6mo**	**1yr**	**3yr**	**5yr**
Total Nonfarm	113,909	100.0	196.9	2.1	4.0	1.9	2.2	2.9	−0.4
Total Private	98,072	86.1	93.4	1.2	3.1	1.7	1.8	2.8	−0.4
Goods Producing	11,997	10.5	129.0	13.9	2.4	2.6	1.6	−0.4	−0.9
Mining, Logging and Construction	7,594	6.7	156.5	28.4	−1.1	0.5	1.3	0.4	−0.3
Mining and Logging	0	0.0	0.0						
Construction	7,592	6.7	150.4	27.1	−1.4	0.4	1.3	0.4	−0.3
Manufacturing	4,349	3.8	−39.4	−10.3	3.7	2.5	2.3	−1.6	−1.8
Service Providing	101,942	89.5	86.1	1.0	4.3	1.9	2.2	3.3	−0.3
Trade, Trans & Utilities	17,457	15.3	52.9	3.7	7.6	2.5	0.5	−0.5	−0.9
Wholesale Trade	2,200	1.9	0.0	0.0	−16.3	0.0	0.0	1.6	−0.9
Retail Trade	13,877	12.2	15.3	1.3	13.9	4.2	0.7	−0.6	−1.1
Information	2,845	2.5	18.3	8.1	−3.0	−4.0	0.5	3.2	1.2
Financial Activities	5,168	4.5	−76.3	−16.1	−11.6	−3.0	−1.8	0.9	−0.9
Professional & Business Srvcs	17,949	15.8	66.6	4.6	4.8	0.3	−1.2	0.9	−0.7
Educational & Health Srvcs	22,150	19.4	−18.4	−1.0	4.8	2.9	5.2	4.1	0.8
Leisure & Hospitality	14,687	12.9	−72.7	−5.8	1.9	1.5	1.3	9.6	−1.6
Other Srvcs	5,886	5.2	−2.1	−0.4	7.1	5.8	7.3	8.6	0.4
Government	15,843	13.9	148.8	12.0	9.8	3.9	4.4	3.5	−0.2
Federal	600	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State	1,900	1.7	0.0	0.0	24.1	11.4	5.6	0.0	0.0
Local	13,334	11.7	151.4	14.7	8.8	3.1	4.6	4.5	−0.1
County	2,745	2.4	−3.1	−1.3	10.6	1.2	4.0	1.3	1.6
City	1,400	1.2	0.0	0.0	0.0	−12.9	0.0	5.6	−1.3
Local Government Education	5,285	4.6	32.4	7.7	0.8	−0.6	−0.1	5.6	−1.8

Source: EDD, National Economic Education Delegation (NEED)

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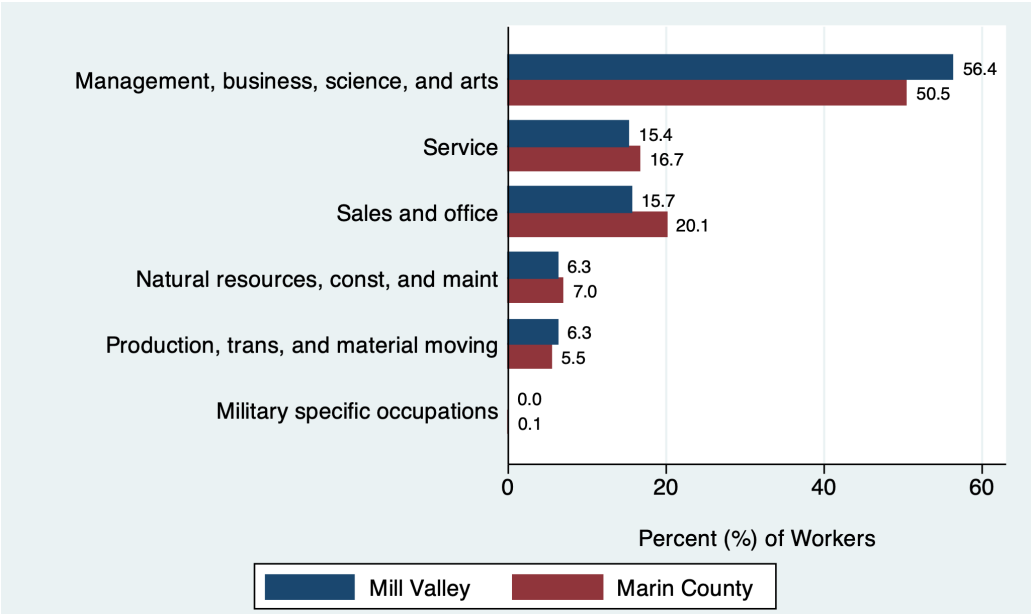
Some Employee Detail

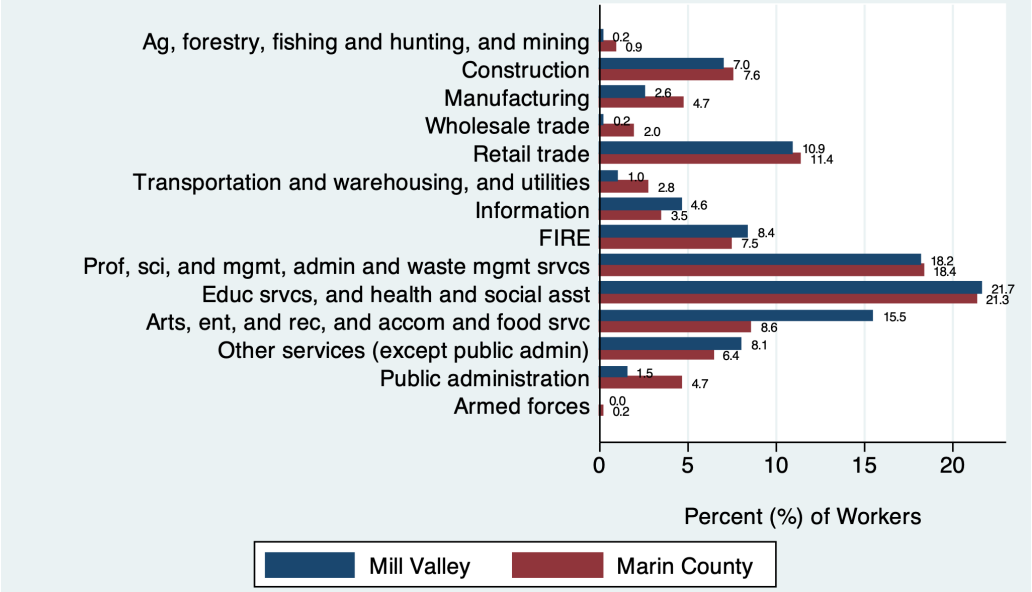
Employed in Mill Valley

Figure 12: Employment by Occupation



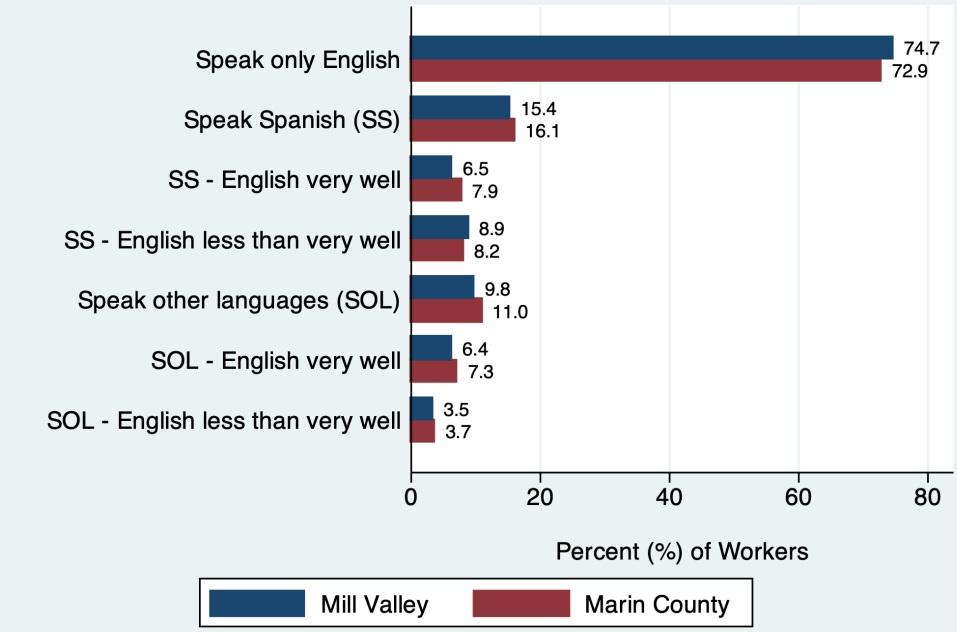
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 13: Employment by Industry



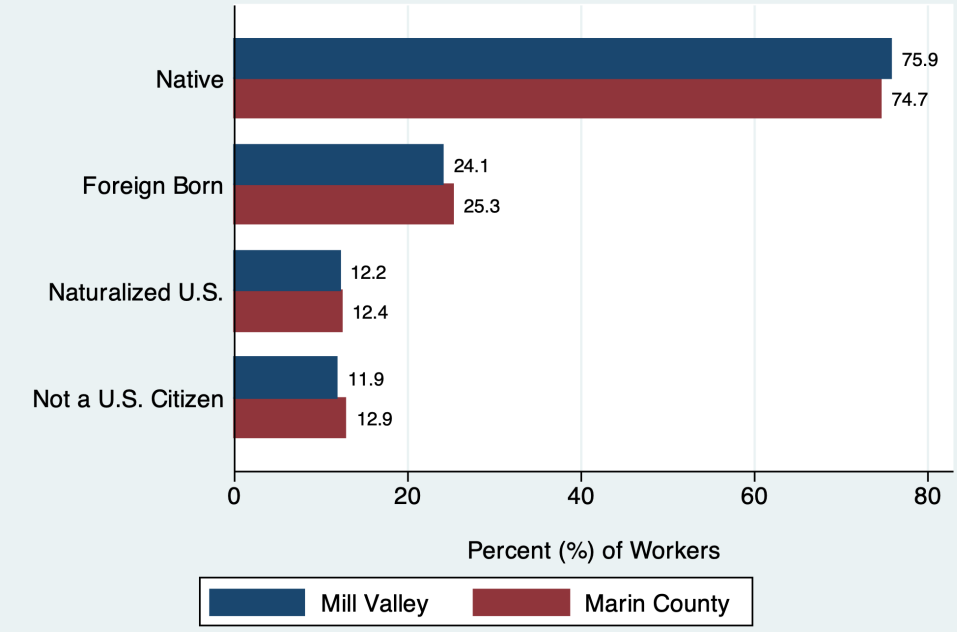
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 14: Language Spoken at Home



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

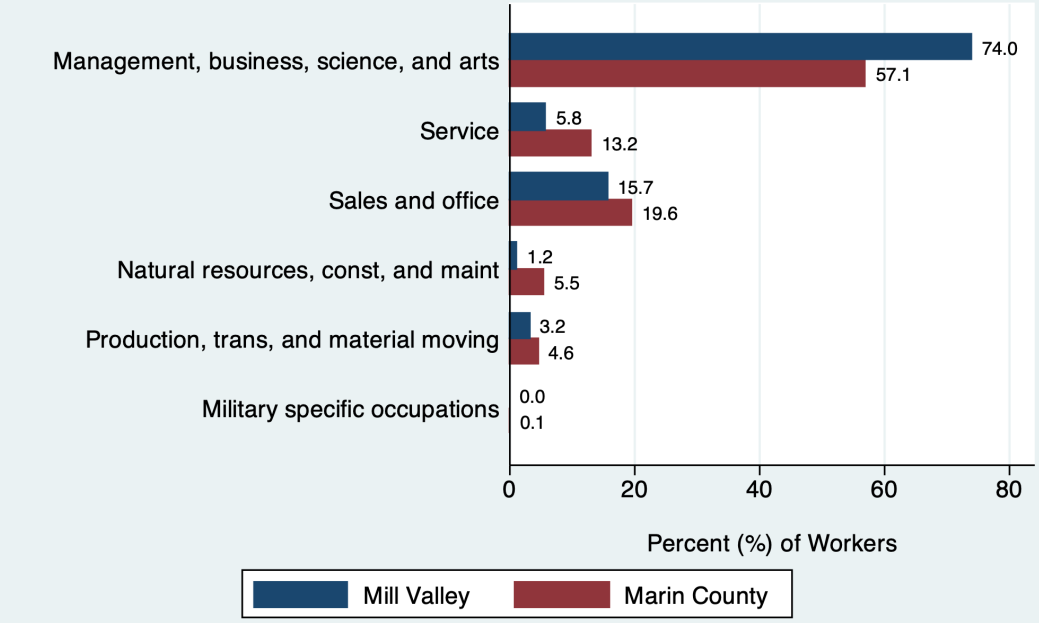
Figure 15: Citizenship



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

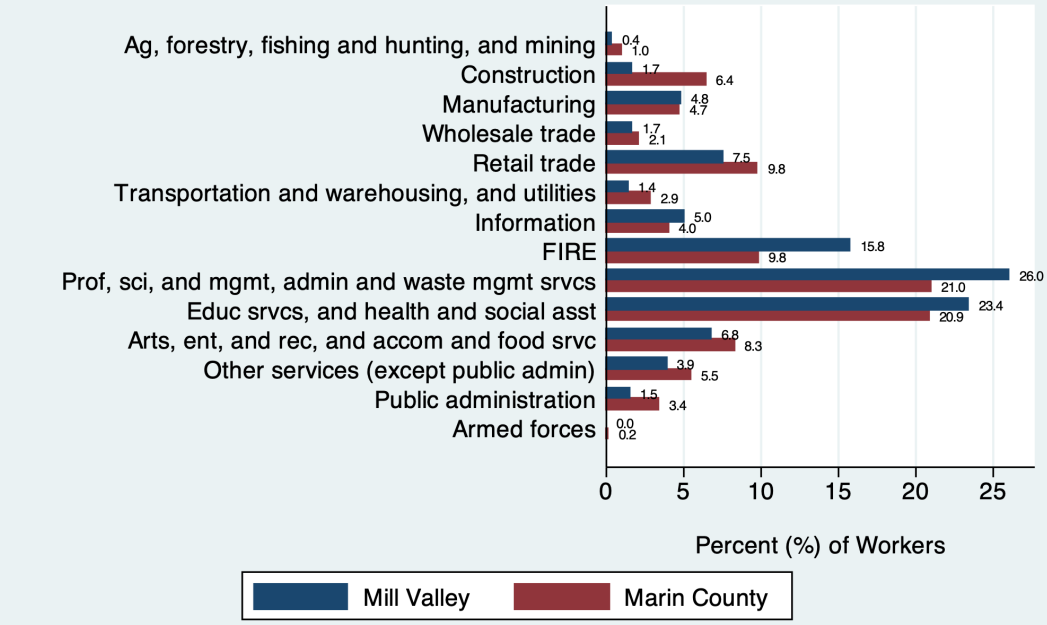
Employed Residents of Mill Valley

Figure 16: Employment by Occupation



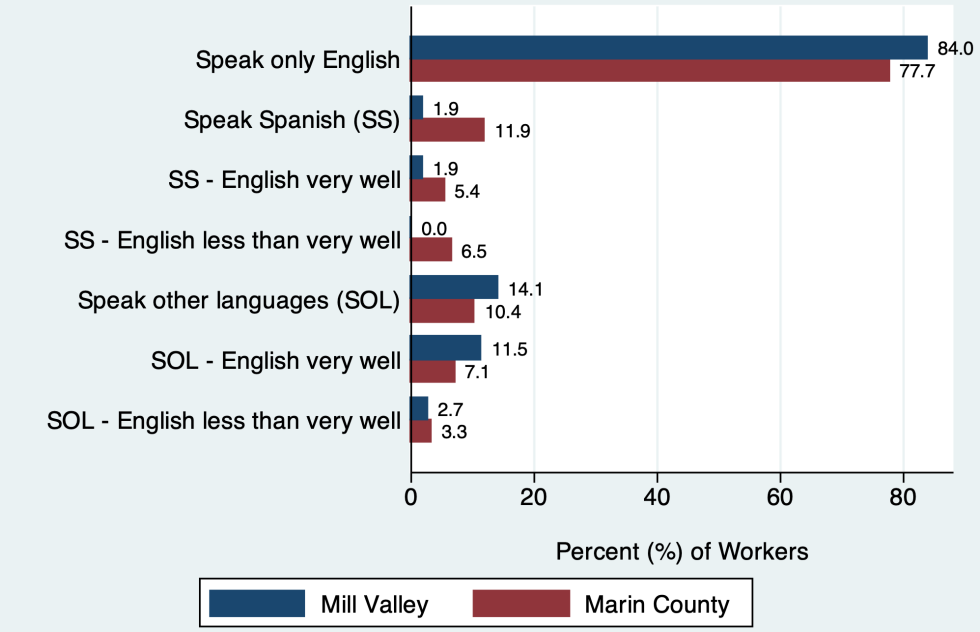
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 17: Employment by Industry



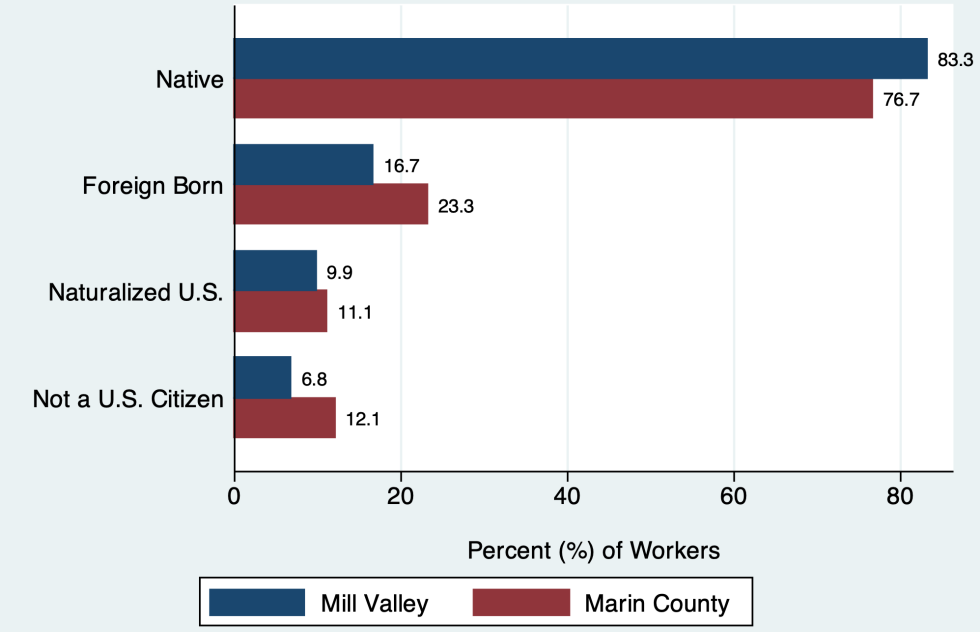
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 18: Language Spoken at Home



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

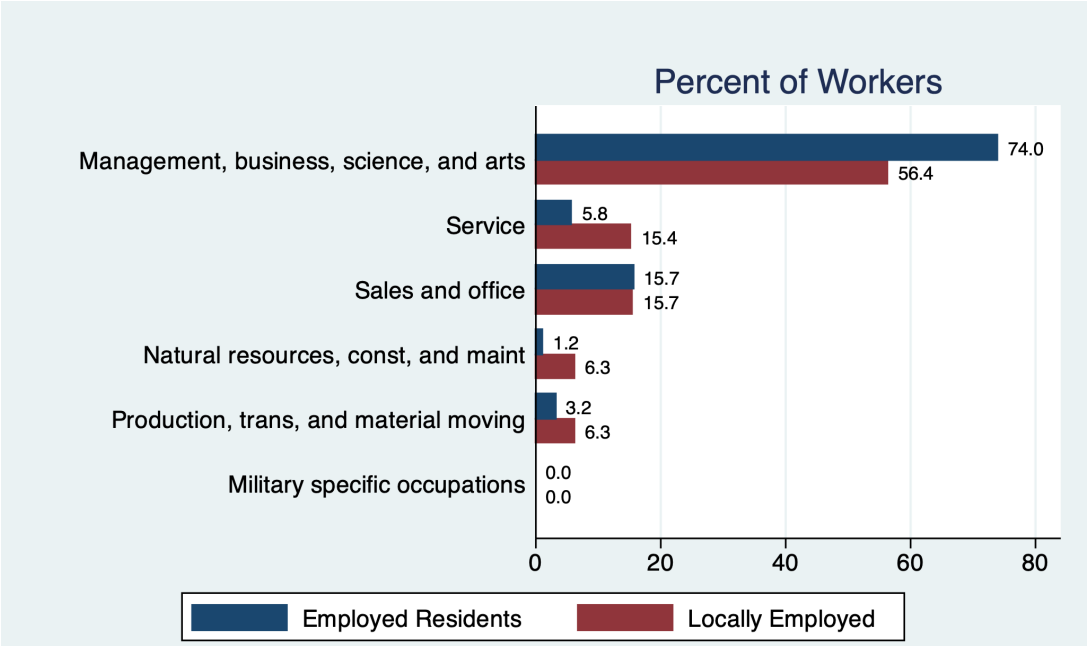
Figure 19: Citizenship



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

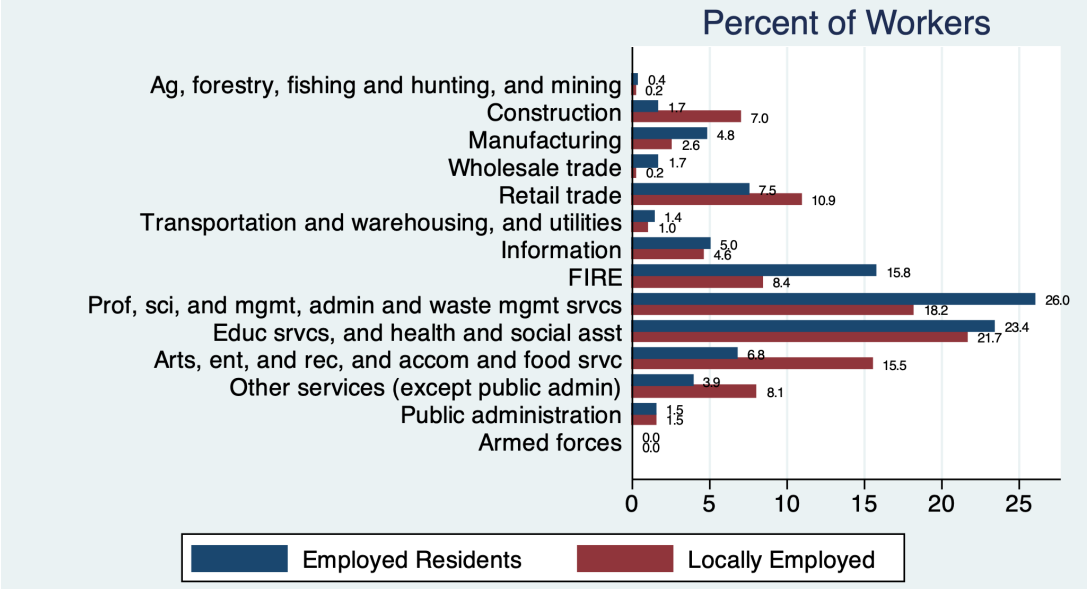
Employed Residents vs Workers in Mill Valley

Figure 20: Employment by Occupation



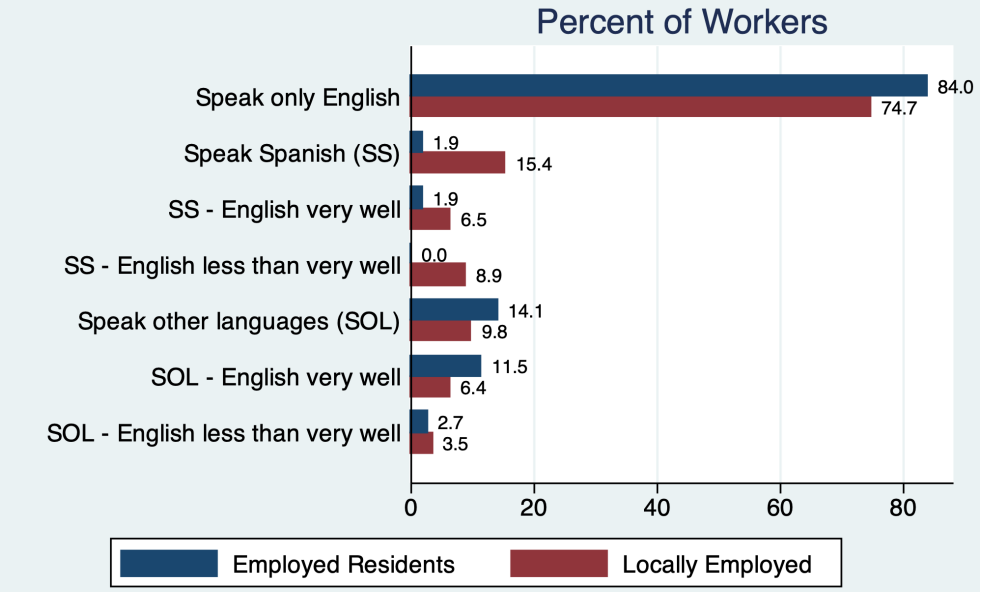
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 21: Employment by Industry



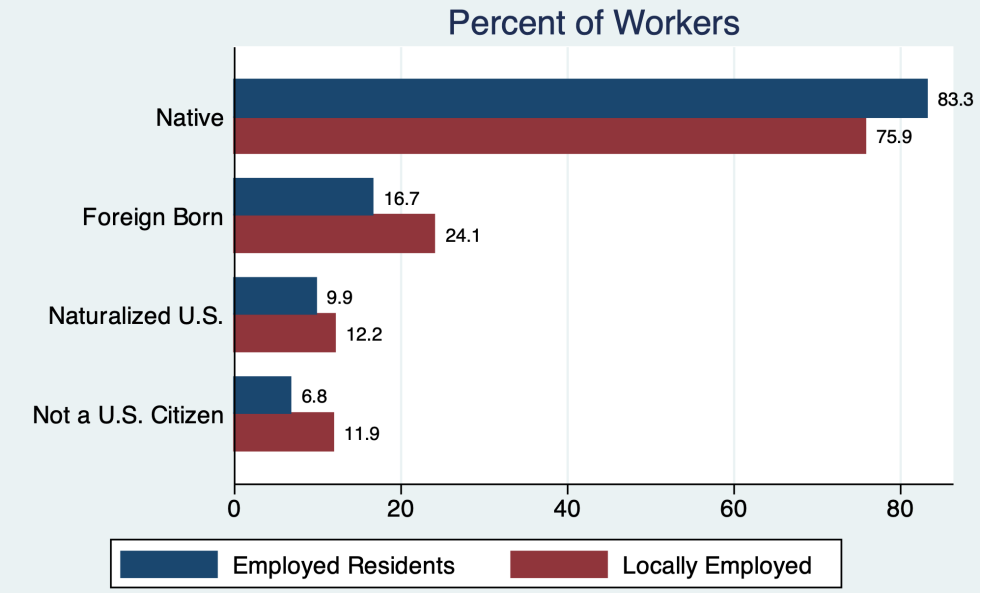
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 22: Language Spoken at Home



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 23: Citizenship



Source: American Community Survey, 2022 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 Mill Valley. 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 24: Real Per Capita Income Ranking Among California Cities

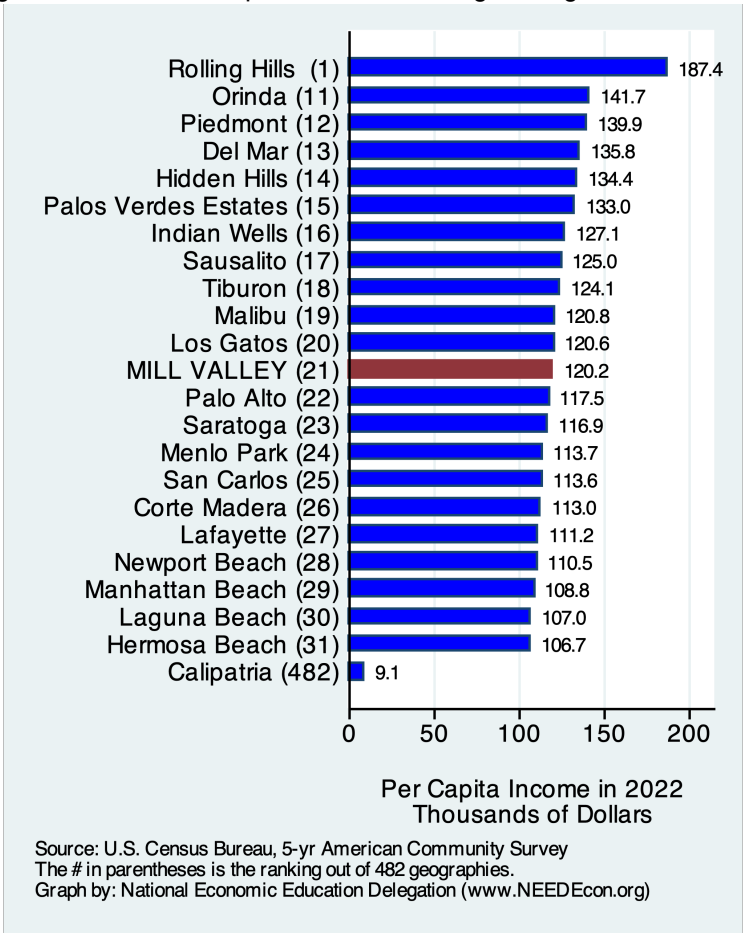
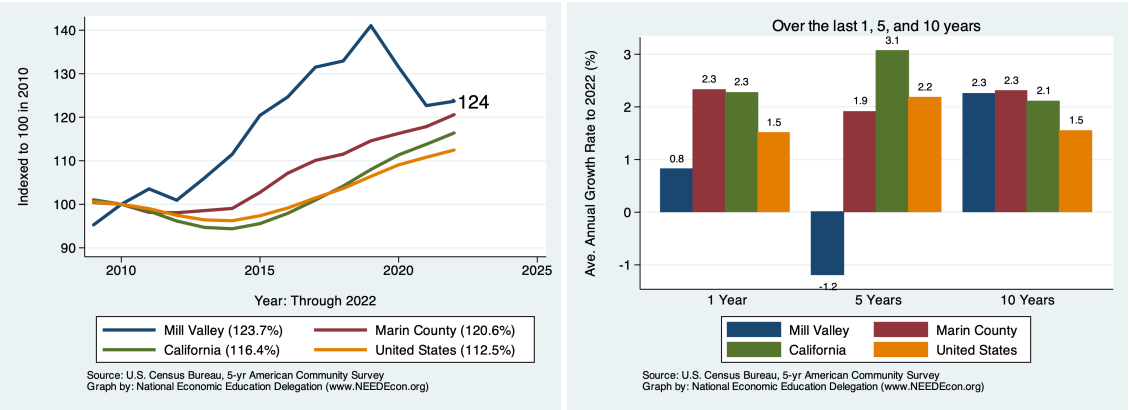


Figure 25: Regional Comparison of Growth over Time



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

Figure 26: Income Levels

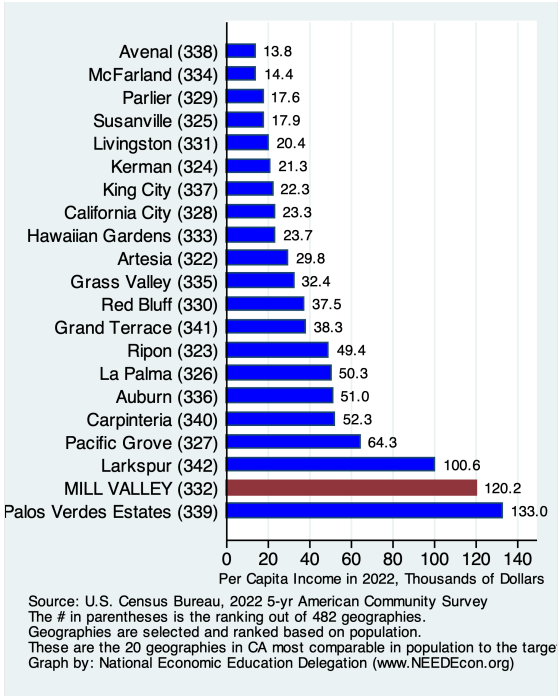
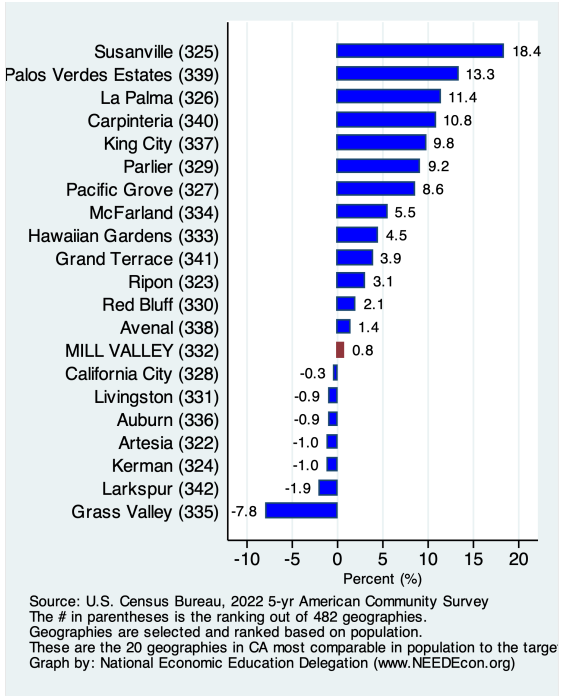


Figure 27: Growth over Time



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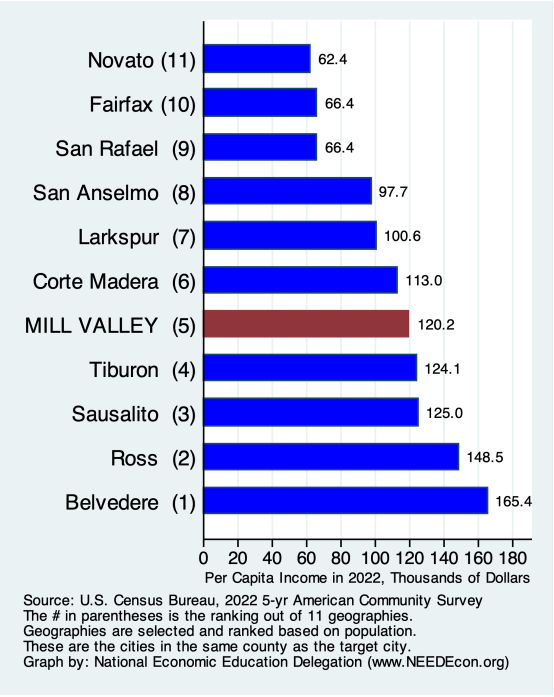
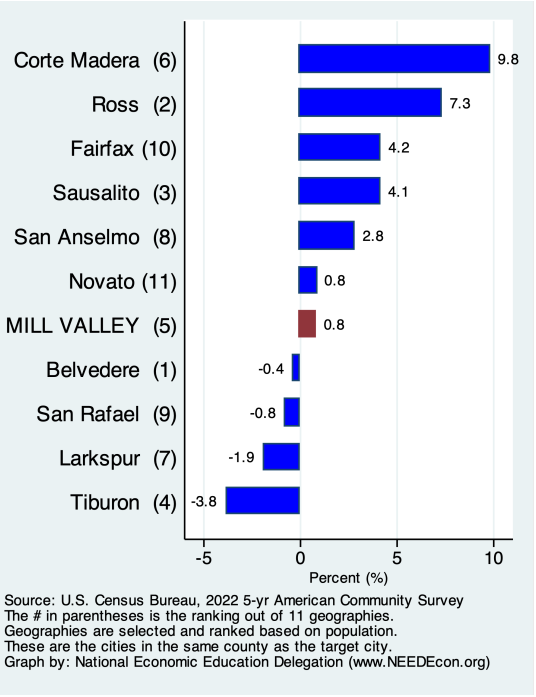
Real Per Capita Income Ranking Among Cities in Marin County

Figure 28: Income Levels



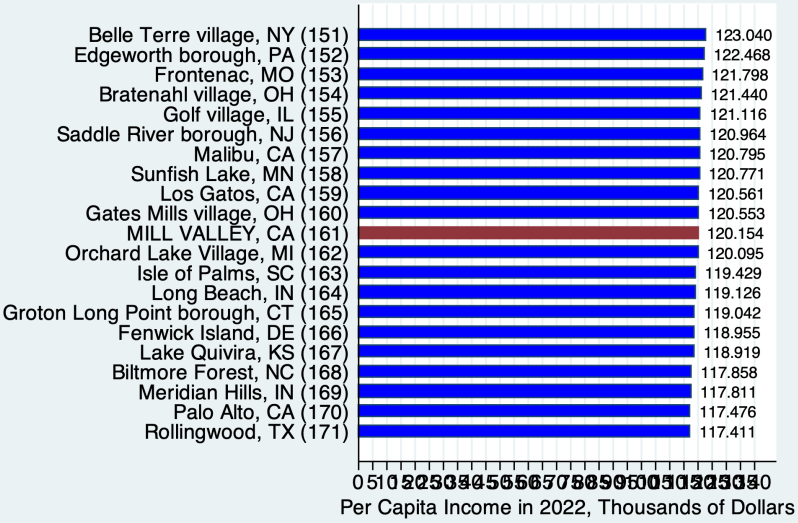
Source: U.S. Census Bureau, 2022 5-yr American Community Survey
The # in parentheses is the ranking out of 11 geographies.
Geographies are selected and ranked based on population.
These are the cities in the same county as the target city.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 29: Growth over Time



Source: U.S. Census Bureau, 2022 5-yr American Community Survey
The # in parentheses is the ranking out of 11 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 30: Comparison with All Cities Nationwide



Source: U.S. Census Bureau, 5-yr American Community Survey
The # in parentheses is the ranking out of 19,695 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

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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.

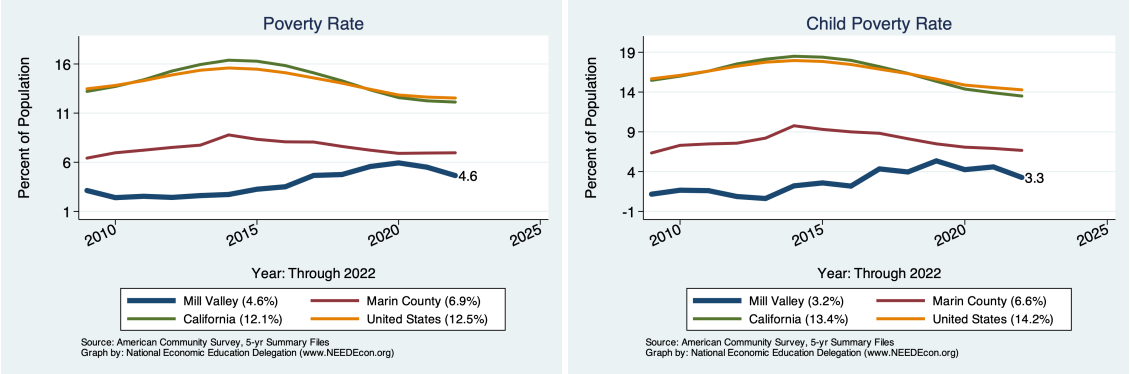


Figure 31: Inequality

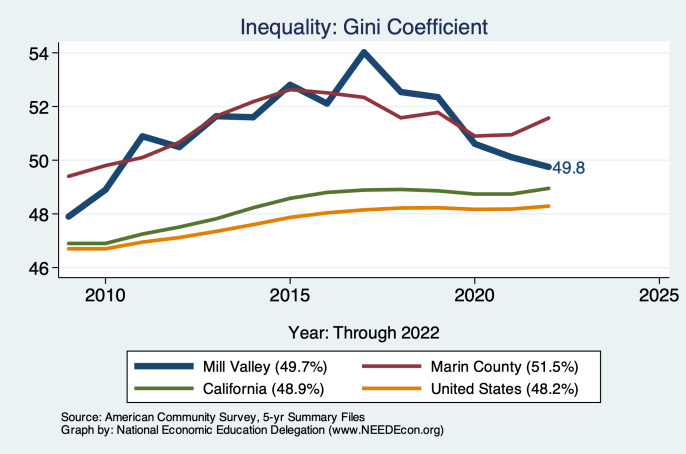
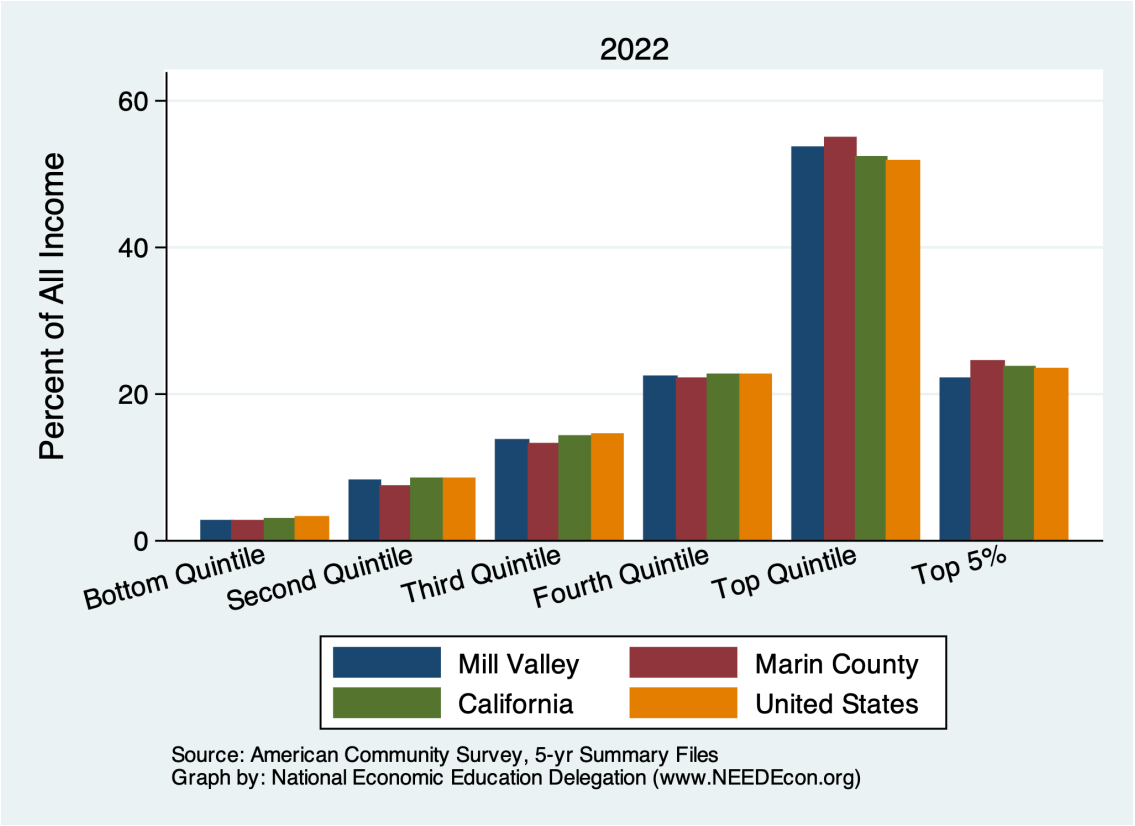
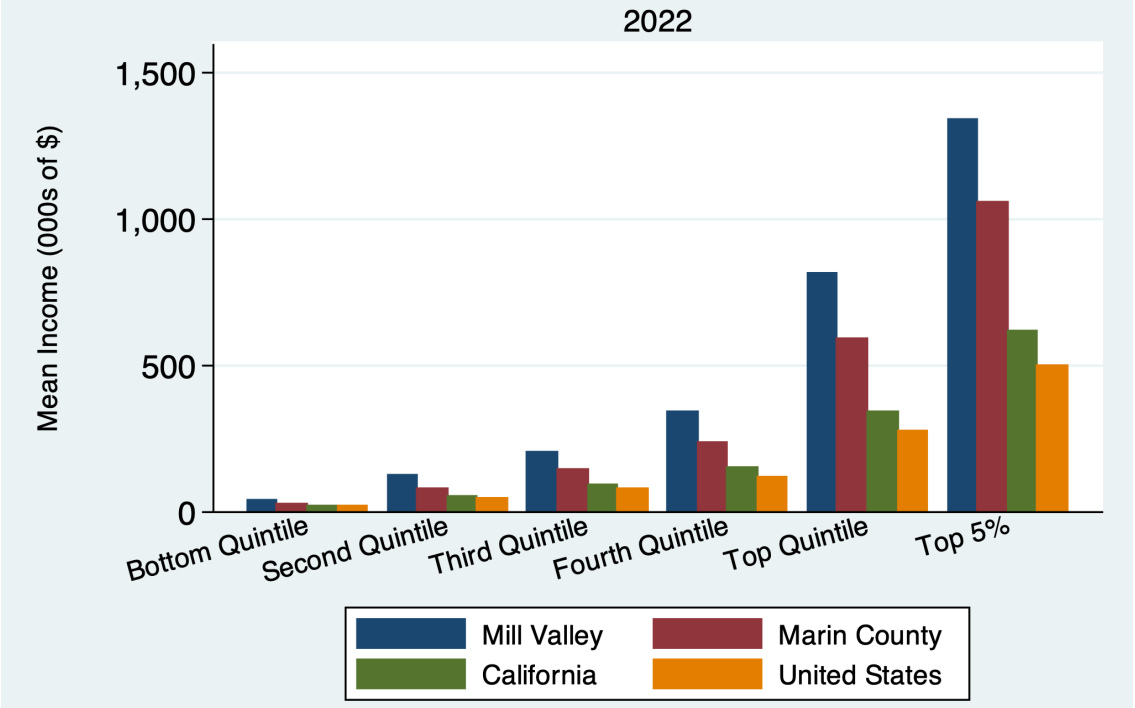


Figure 32: Shares Across the Income Distribution



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

Figure 33: Means Across the Income Distribution



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

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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 Mill Valley and Broader Regions

Figure 34: Median Home Prices

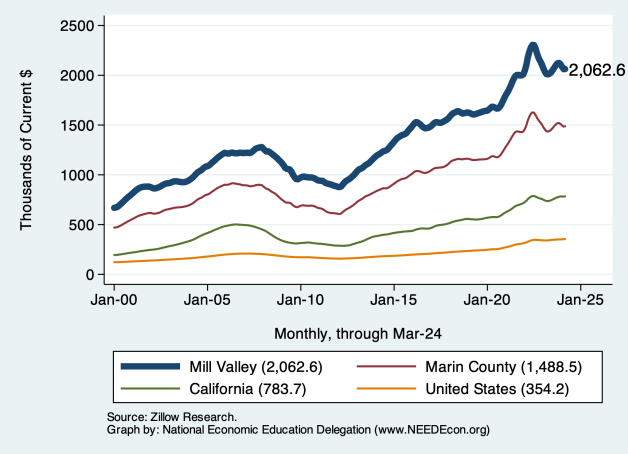
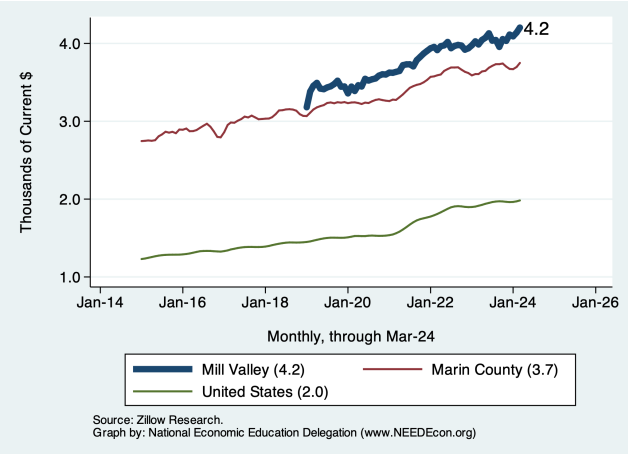


Figure 35: Median Rents



Housing Ownership in Mill Valley and Broader Regions

Figure 36: Home Ownership Rates

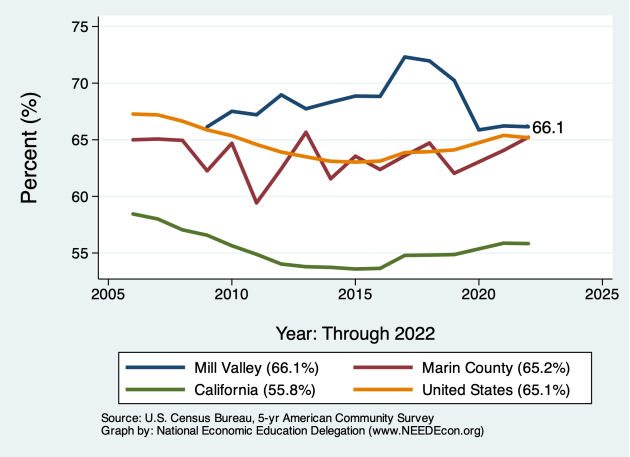


Figure 37: Home Ownership by Age

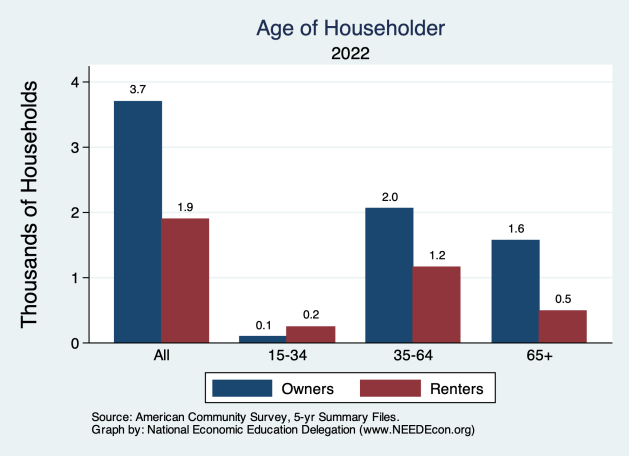


Figure 38: Income by Tenure

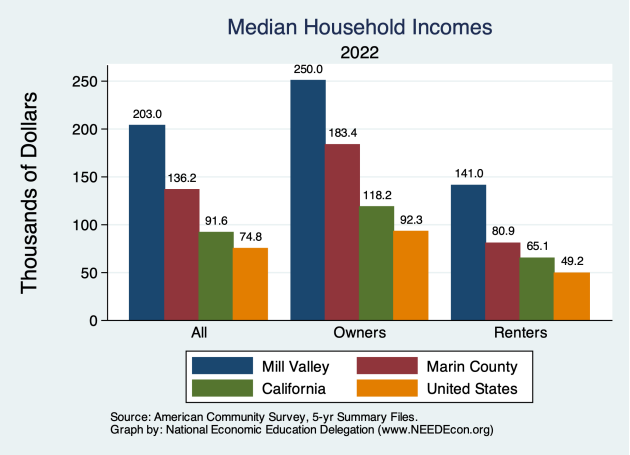


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Figure 39: Income Distribution by Tenure

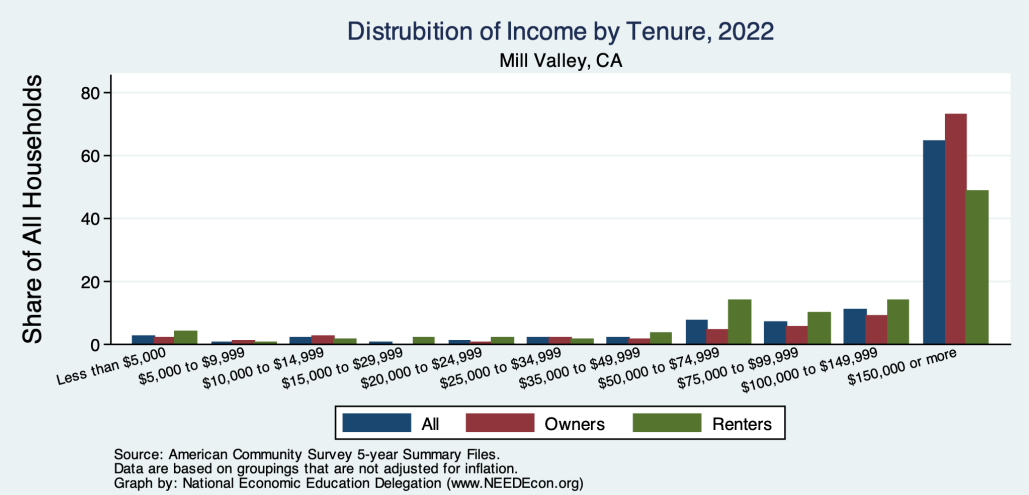


Figure 40: Income Distribution of Home Owners

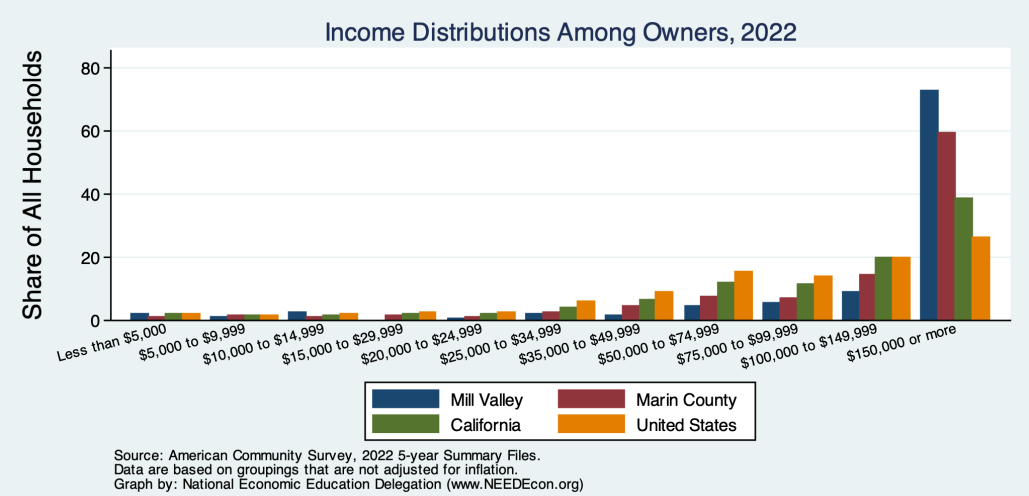
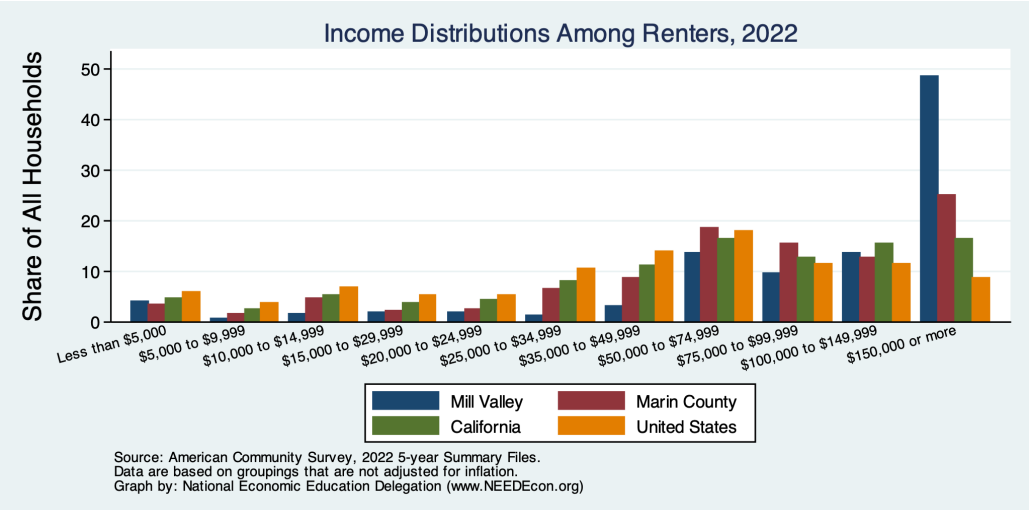


Figure 41: Income Distribution of Renters



Housing Burden in Mill Valley and Broader Regions

Figure 42: Home Owners w/ A Mortgage

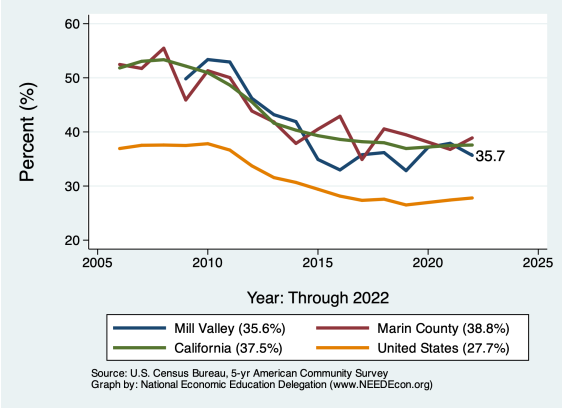


Figure 43: Home Owners w/o A Mortgage

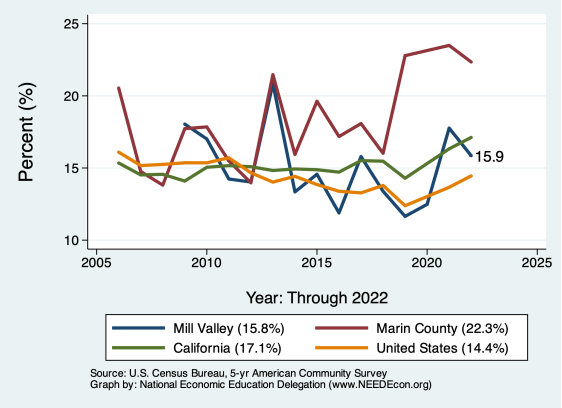


Figure 44: Renters

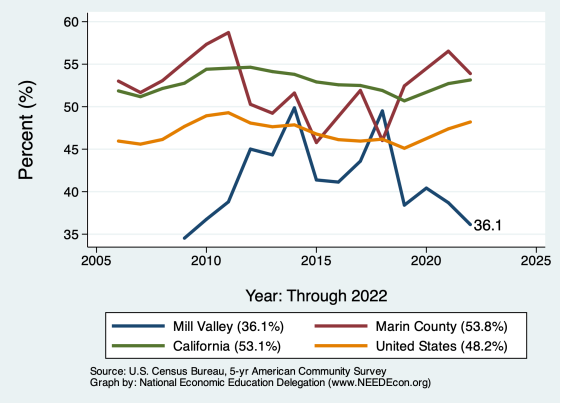
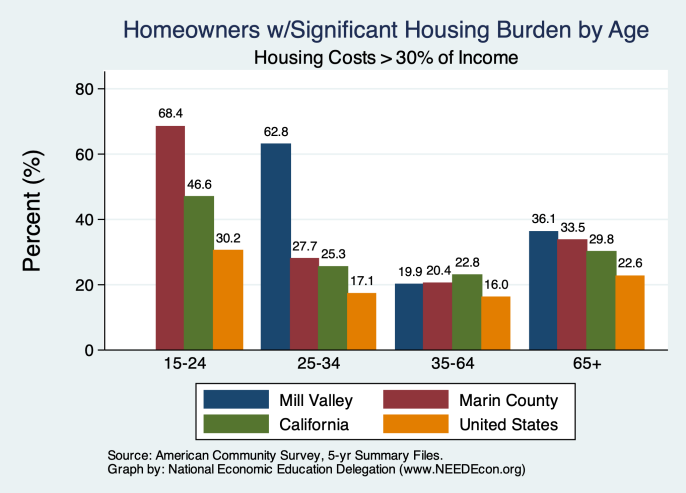


Figure 45: Homeowner Housing Burden by Age



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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	2023	2019	2010	% Change from 2019	% Change from 2010
Total Population	13,664.0	14,743.0	13,903.0	-7.3	-1.7
Total # of Homes	6,539.0	6,654.0	6,534.0	-1.7	0.1
# Occupied Units	6,023.0	6,283.0	6,084.0	-4.1	-1.0
Persons per Household	2.3	2.3	2.3	-3.4	-0.7
Vacancy Rate (%)	7.9	5.6	6.9	41.5	14.6

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

Figure 46: Housing Growth

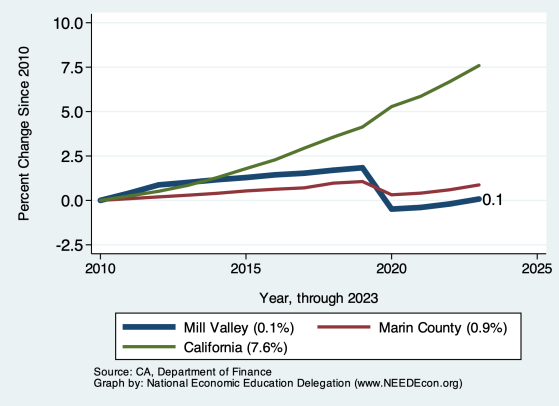


Figure 47: Persons per Household

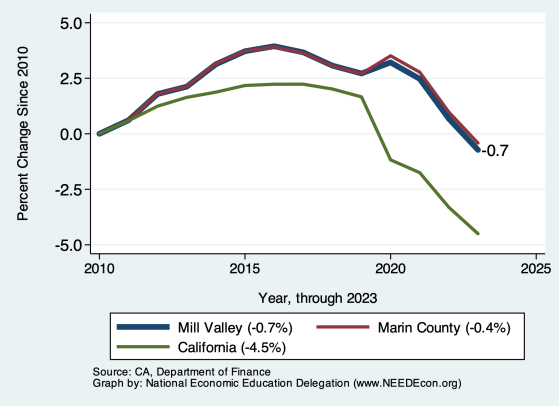


Figure 48: Vacancy Rates

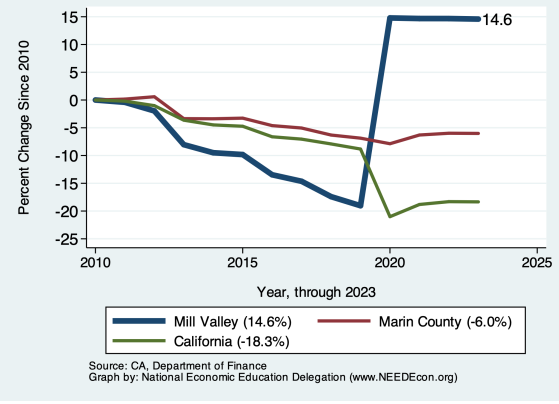
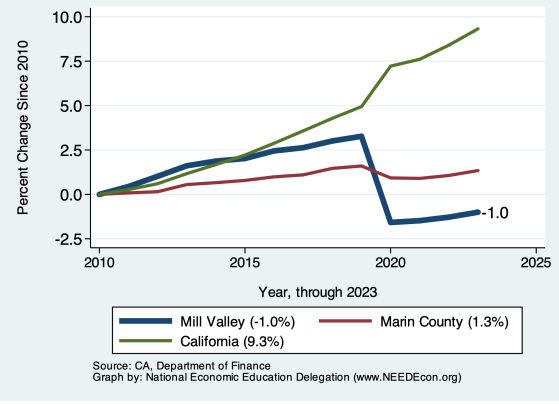


Figure 49: Number of Occupanied Units



Trends in the Growth of Housing by Housing Type

Figure 50: Single Detached Homes

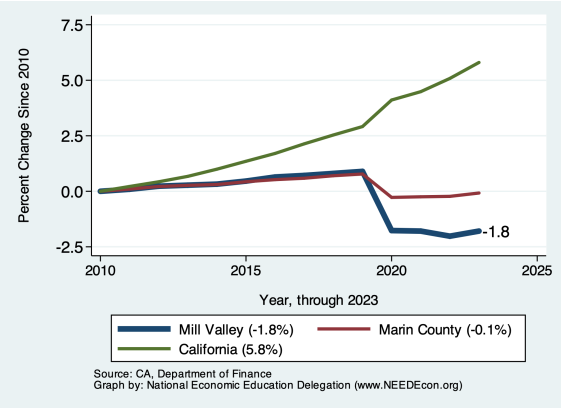


Figure 51: Single Attached Homes

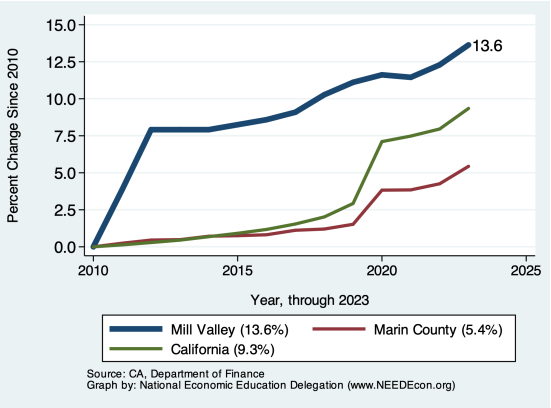


Figure 52: Housing in Buildings with Two to Four Units

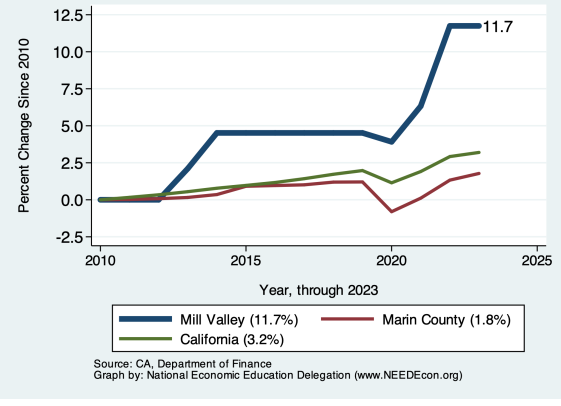
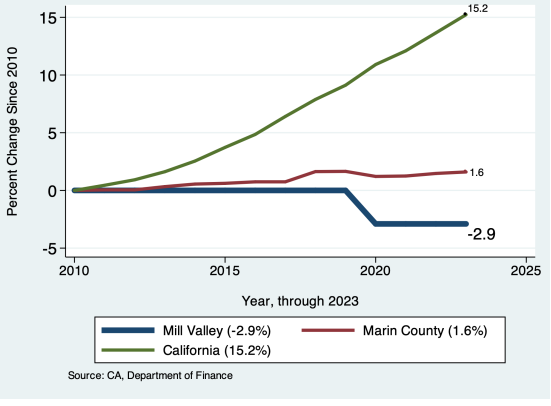


Figure 53: Housing in Buildings with Five or More Units



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Vintage of Residential Housing

Why is it important?

This section provides evidence on the year in which residential housing in Mill Valley was built. We break it down into owned versus rented residences and provide a comparison across Marin 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 54: Distribution of Housing Construction

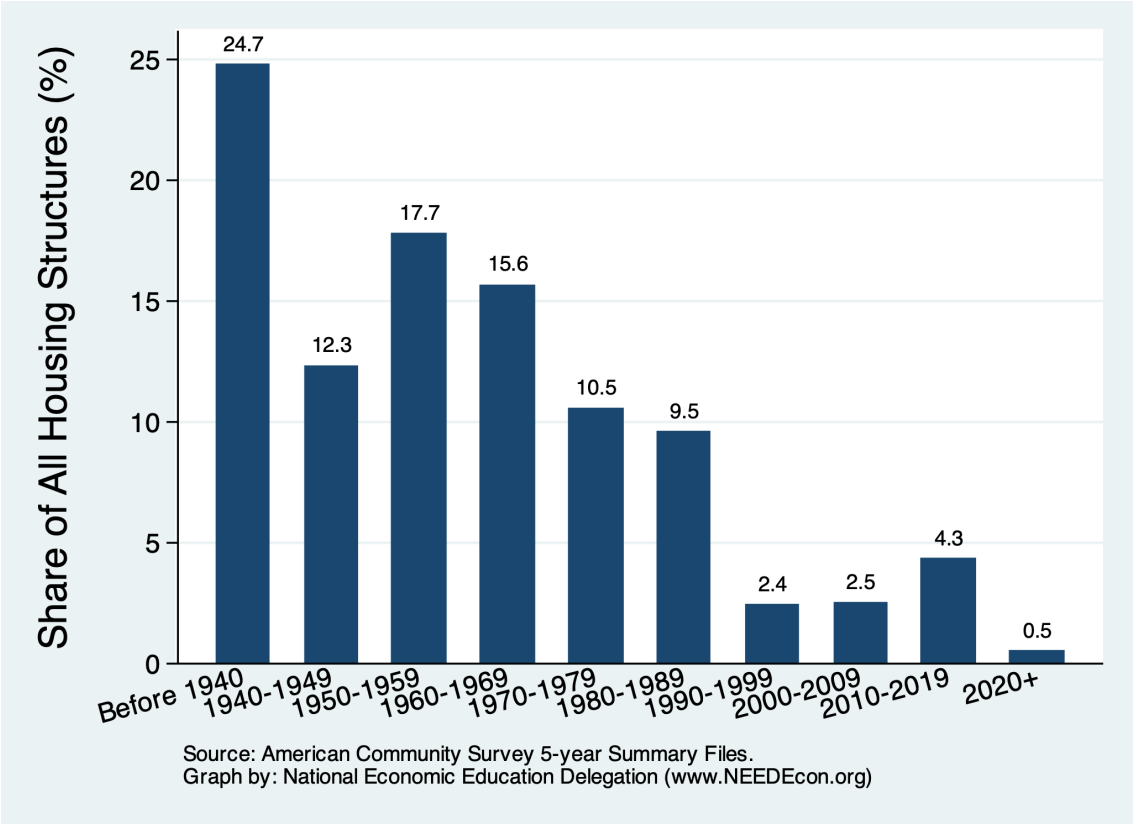


Figure 55: Housing Vintage across Regions

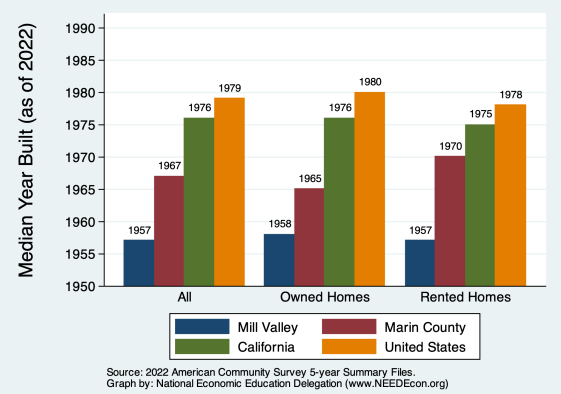


Figure 56: Housing Vintage by Tenure

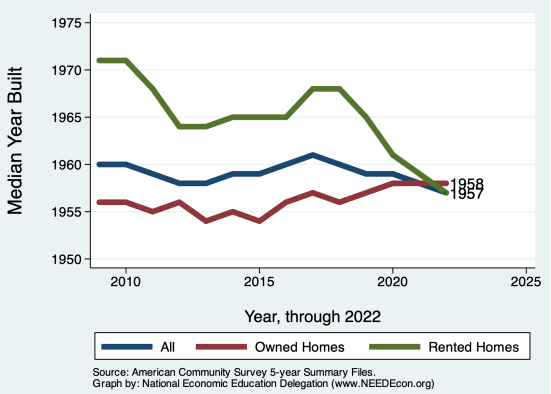


Figure 57: Vintage of Owned Residences

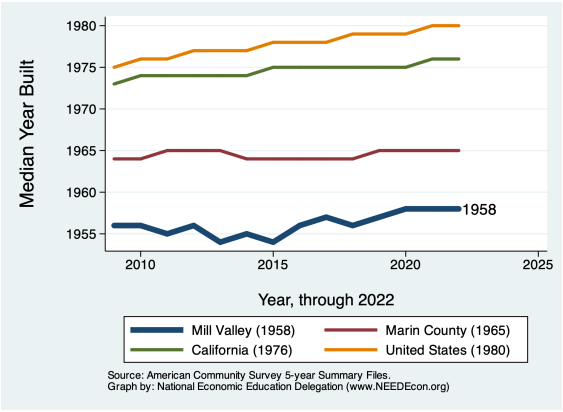


Figure 58: Vintage of Rented Residences

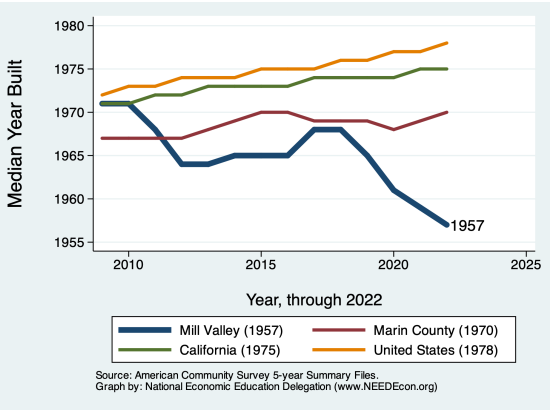
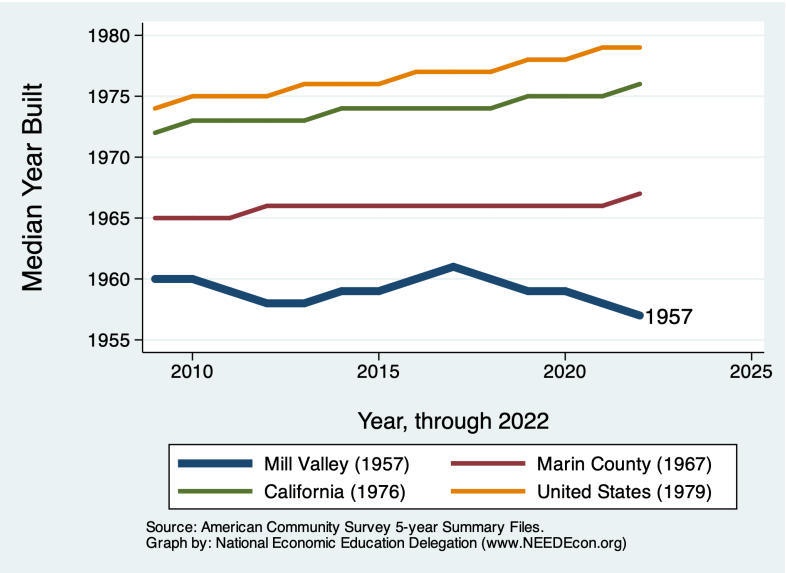


Figure 59: Vintage of All Residences



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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 60: Year Current Occupant Moved In

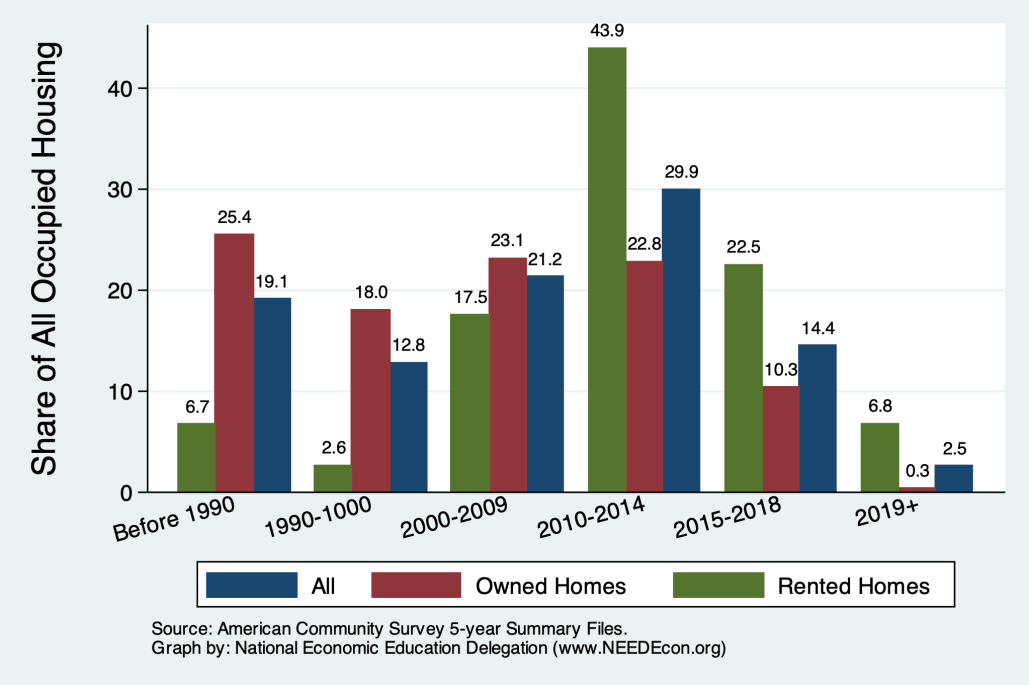

Figure 61: Year Occupied by Current Residents across Regions

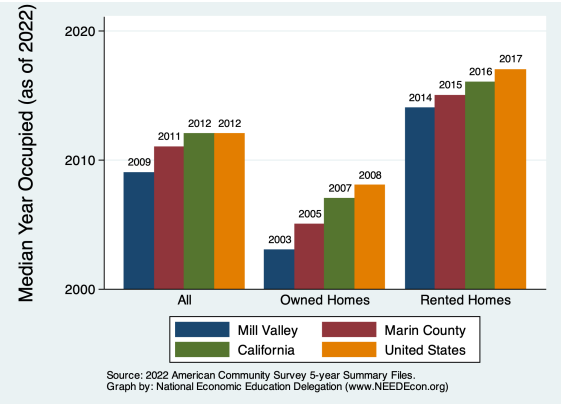

Figure 62: Year Occupied by Current Residents by Tenure

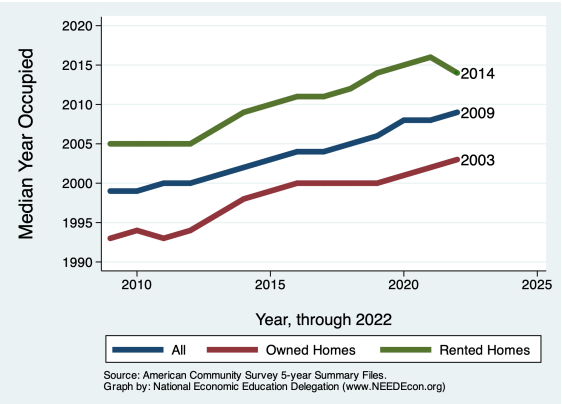

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Figure 63: Year Occupied by Current Residents for Owned Housing

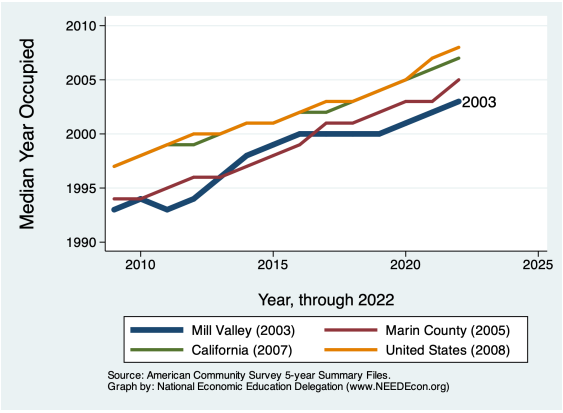


Figure 64: Year Occupied by Current Residents for Rented Housing

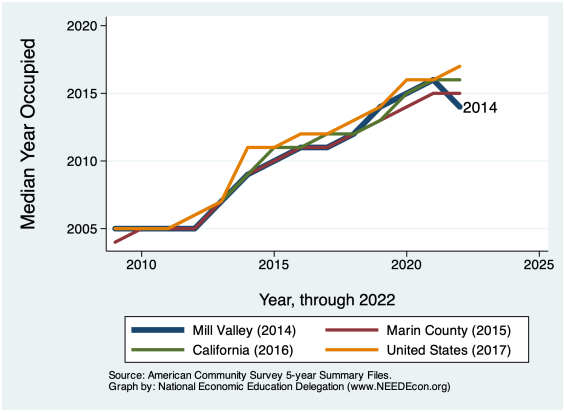
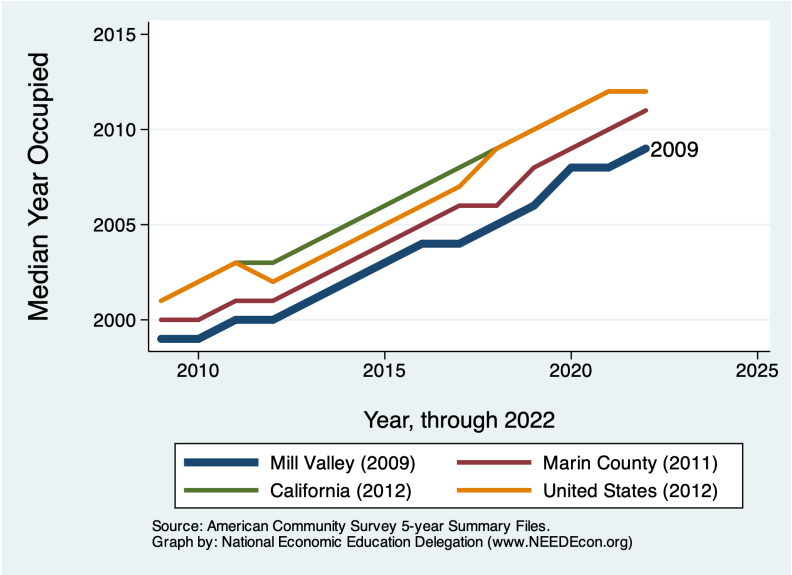


Figure 65: Year Occupied by Current Residents for All Housing



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Residential Permitting

Definition:

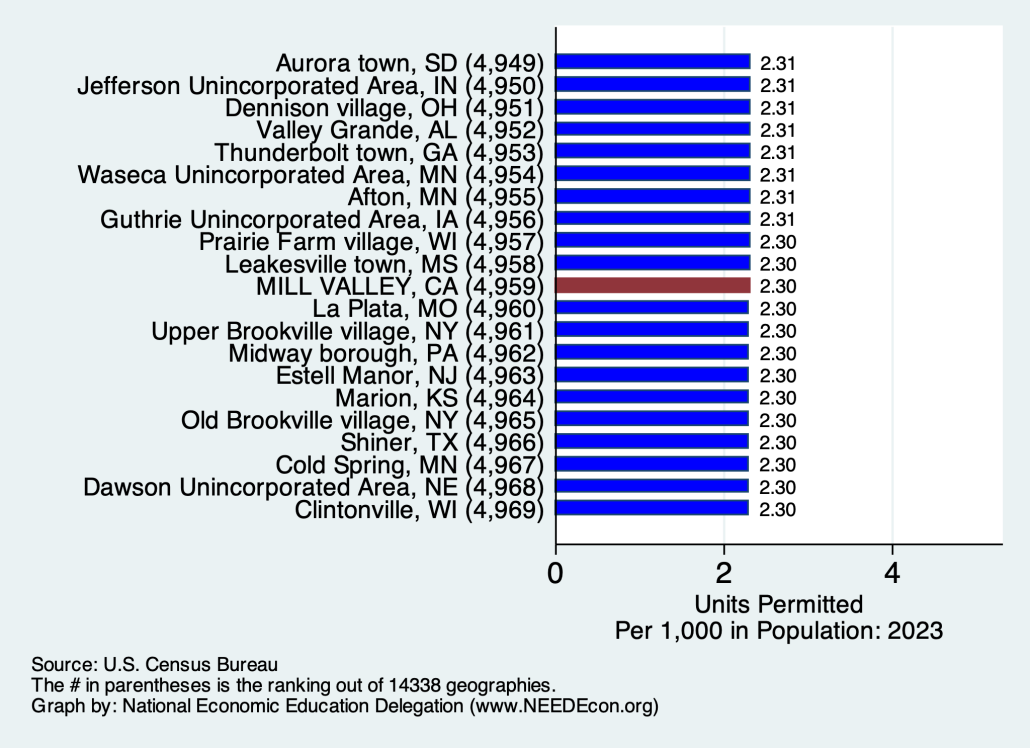
This indicator provides evidence on the number of residential buildings that are permitted for construction each year. Permit data for Mill Valley is compared with data from Marin County as a whole and broader regions. The statistic provided scales the number of permits by population. This is done to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

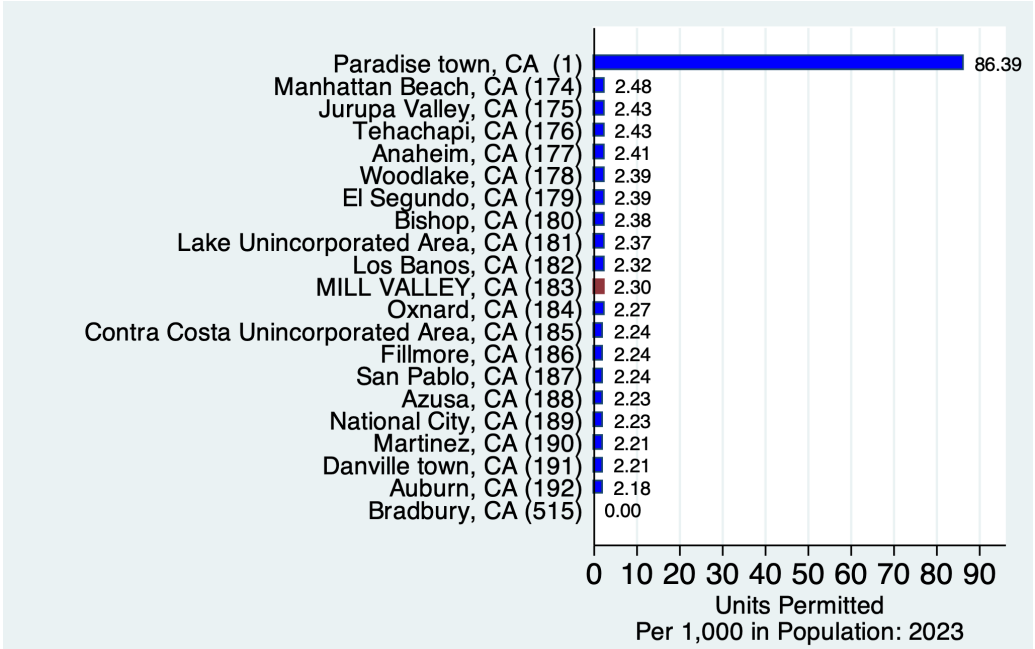
Mill Valley - Ranking Among Comparables

Figure 66: Number of Units Permitted - Nationwide Comparables (Rank)



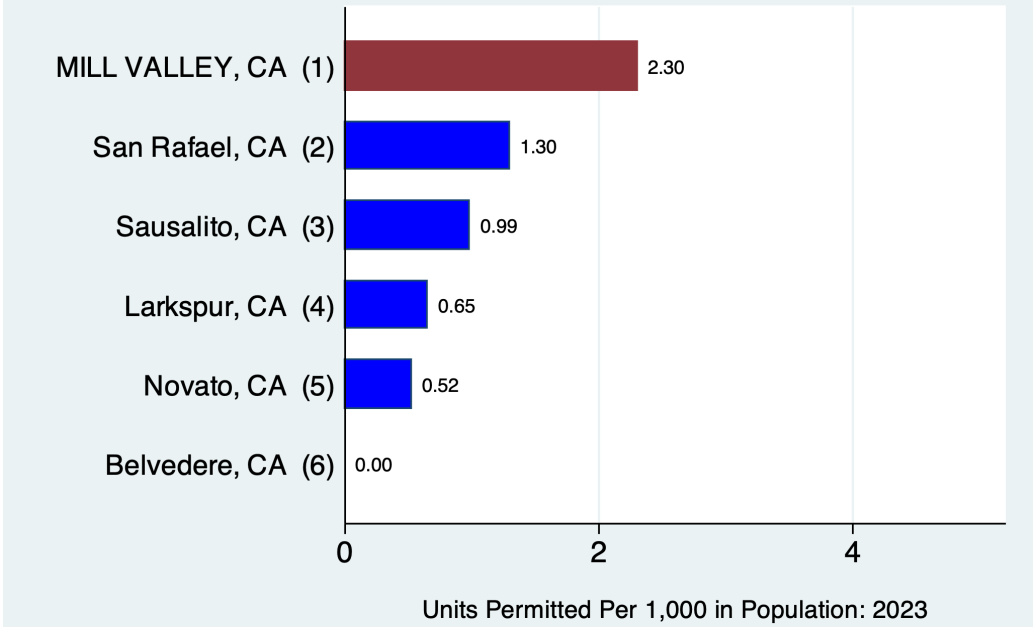
Source: U.S. Census Bureau
The # in parentheses is the ranking out of 14338 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 67: 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 68: Number of Units Permitted - Cities in Marin County (Rank)



Source: U.S. Census Bureau,
The # in parentheses is the ranking out of 6 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Mill Valley - Permitting Activity

Annual Units Permitted - Per Capita in Mill Valley

Figure 69: Units Permitted Each Year

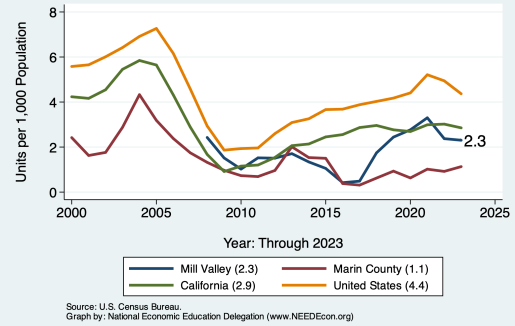
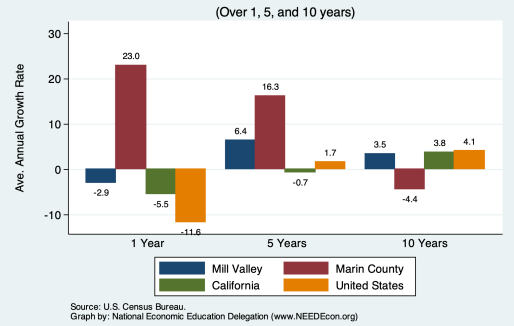


Figure 70: Average Annual Growth in Units Permitted



Annual Number of Buildings Permitted - Per Capita in Mill Valley

Figure 71: Units Permitted Each Year

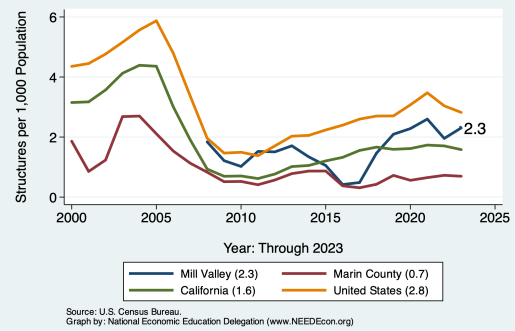
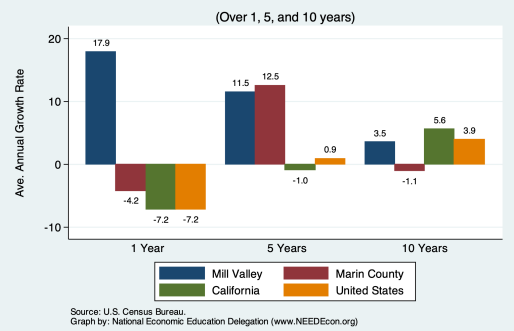


Figure 72: Average Annual Growth in Buildings Permitted



Annual Value of Property Permitted - Per Capita in Mill Valley

Figure 73: Value Permitted Each Year

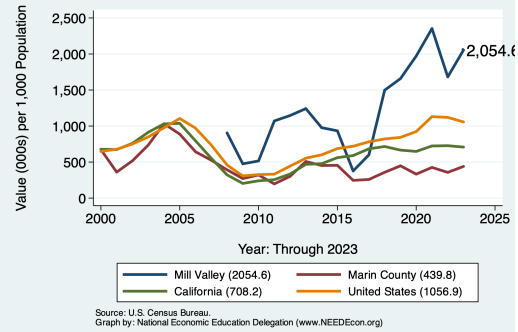
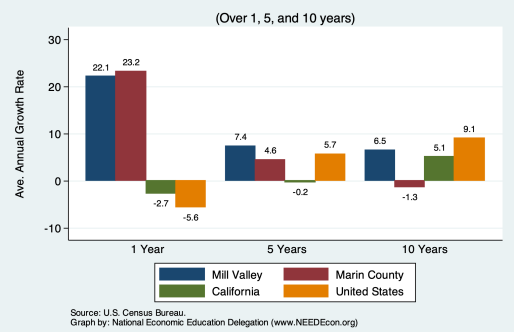


Figure 74: Average Annual Growth in Value Permitted



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 75: Percent of Workers Commuting by Car Alone

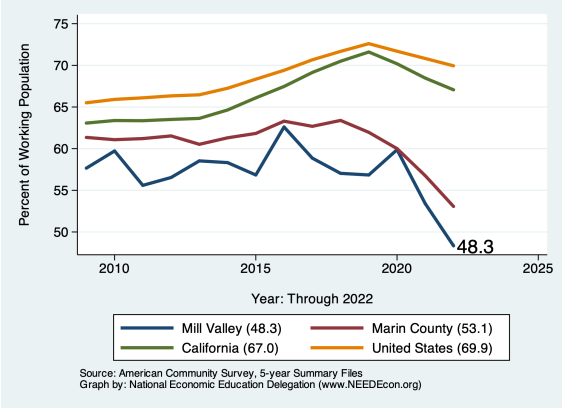


Figure 76: Percent of Workers Commuting by Carpool

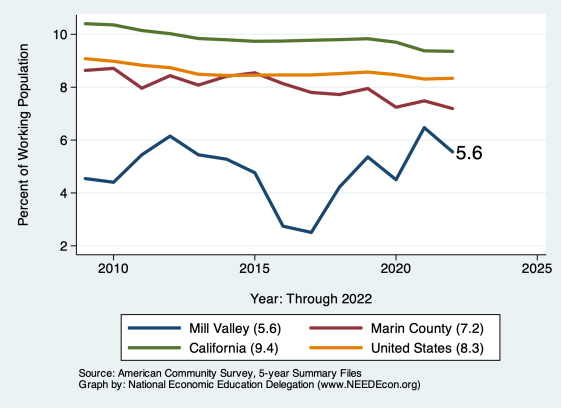


Figure 77: Percent of Workers using Public Transportation

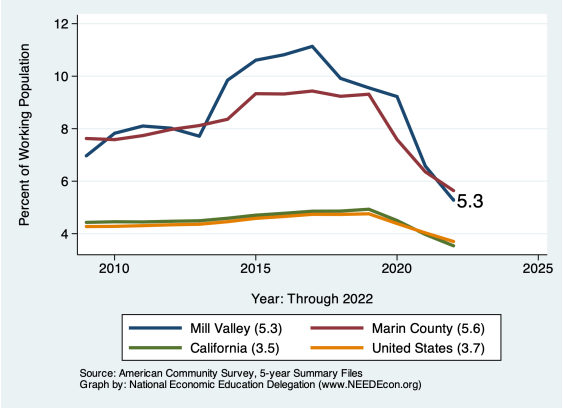
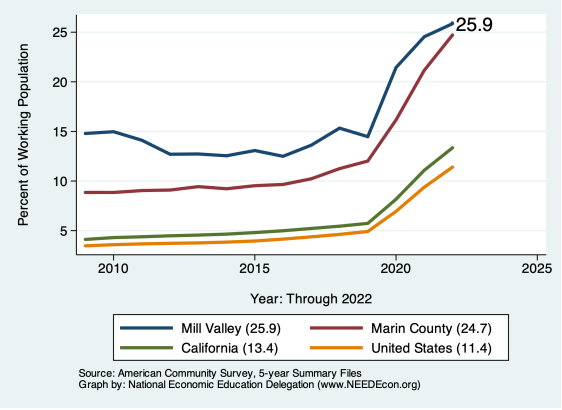


Figure 78: Percent of Workers Who Work From Home



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The first table on this page presents data for those who LIVE in Mill Valley. The second provides data on those who work, but do not necessarily live in Mill Valley. 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:	2,100	53.5	1,791	53.2	3,891	53.9	78.0
Drove Alone	1,896	48.3	1,594	47.3	3,490	48.3	68.4
Carpooled:	204	5.2	197	5.9	401	5.6	9.5
In 2-person carpool	74	1.9	164	4.9	238	3.3	6.9
In 3-person carpool	34	0.9	16	0.5	50	0.7	1.5
In 4-or-more-person carpool	96	2.4	17	0.5	113	1.6	1.1
Public Transportation (excl Taxi):	286	7.3	95	2.8	381	5.3	3.6
Bus or Trolley Bus	259	6.6	95	2.8	354	4.9	2.3
Streetcar or Trolley Car	0	0.0	0	0.0	0	0.0	0.8
Subway or Elevated	0	0.0	0	0.0	0	0.0	0.3
Railroad	0	0.0	0	0.0	0	0.0	0.2
Ferryboat	27	0.7	0	0.0	27	0.4	0.1
Bicycle	75	1.9	40	1.2	115	1.6	0.7
Walked	97	2.5	208	6.2	305	4.2	2.4
Taxicab, Motorcycle, or other	13	0.3	0	0.0	13	0.2	1.7
Worked at Home	1,049	26.7	818	24.3	1,867	25.9	13.6
Total:	3,620	92.3	2,952	87.7	6,572	91.0	

Source: 2022 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:	2,421	61.5	2,463	56.0	4,884	63.3	78.0
Drove Alone	2,092	53.1	2,203	50.1	4,295	55.6	68.5
Carpooled:	329	8.4	260	5.9	589	7.6	9.5
In 2-person carpool	261	6.6	217	4.9	478	6.2	6.9
In 3-person carpool	42	1.1	25	0.6	67	0.9	1.5
In 4-or-more-person carpool	26	0.7	18	0.4	44	0.6	1.1
Public Transportation (excl Taxi):	120	3.0	42	1.0	162	2.1	3.6
Bus or Trolley Bus	107	2.7	42	1.0	149	1.9	2.3
Streetcar or Trolley Car	0	0.0	0	0.0	0	0.0	0.8
Subway or Elevated	13	0.3	0	0.0	13	0.2	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	42	1.1	0	0.0	42	0.5	0.7
Walked	79	2.0	247	5.6	326	4.2	2.4
Taxicab, Motorcycle, or other	32	0.8	9	0.2	41	0.5	1.7
Worked at Home	1,049	26.6	818	18.6	1,867	24.2	13.6
Total:	3,743	95.0	3,579	81.4	7,322	94.9	

Source: 2022 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	39	1.2	61	2.2	100	1.7	2.0
5 to 9 minutes	175	5.3	457	16.3	632	10.6	7.5
10 to 14 minutes	311	9.4	285	10.2	596	10.0	12.2
15 to 19 minutes	431	13.1	307	11.0	738	12.4	15.0
20 to 24 minutes	277	8.4	210	7.5	487	8.2	14.3
25 to 29 minutes	31	0.9	125	4.5	156	2.6	6.3
30 to 34 minutes	201	6.1	90	3.2	291	4.9	15.0
35 to 39 minutes	123	3.7	9	0.3	132	2.2	2.9
40 to 44 minutes	161	4.9	89	3.2	250	4.2	4.3
45 to 59 minutes	315	9.5	234	8.4	549	9.2	8.6
60 to 89 minutes	399	12.1	227	8.1	626	10.5	7.9
90 or more minutes	108	3.3	40	1.4	148	2.5	4.0
Total:	2,571	77.9	2,134	76.3	4,705	78.9	

Source: 2022 5-year American Community Survey, Summary File

Figure 79: Percent of Employed Population With Commutes of More than 30 Minutes

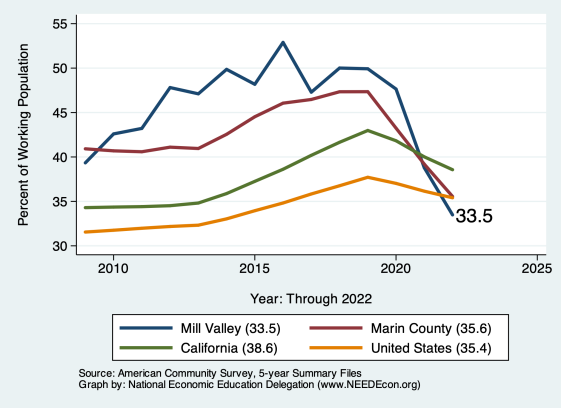


Figure 80: Percent of Employed Population With Commutes of More than 90 Minutes

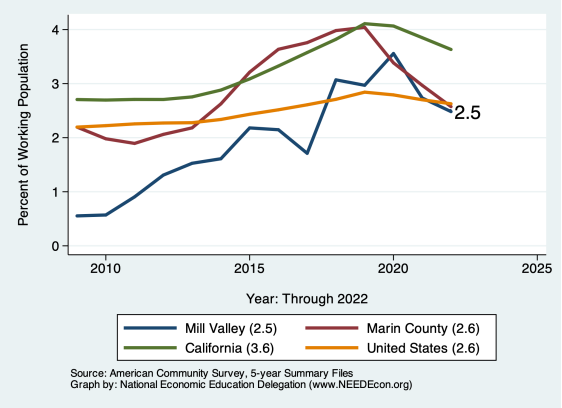
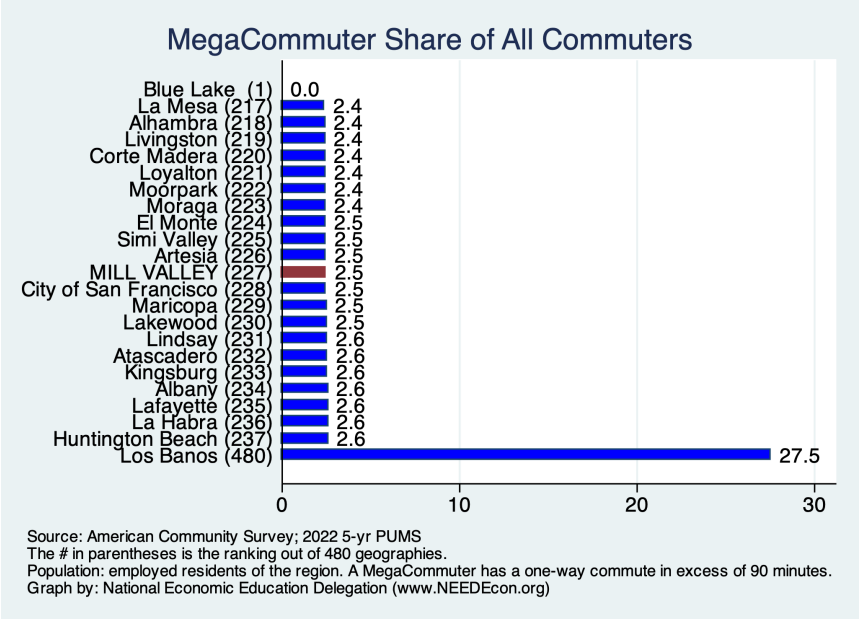


Figure 81: Rank: Share of MegaCommuters Across Similar Geographies



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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	26	0.8	149	3.9	175	2.6	2.0
5 to 9 minutes	245	7.7	375	9.8	620	9.2	7.5
10 to 14 minutes	154	4.8	203	5.3	357	5.3	12.2
15 to 19 minutes	551	17.3	398	10.4	949	14.0	15.0
20 to 24 minutes	283	8.9	309	8.1	592	8.7	14.3
25 to 29 minutes	94	2.9	106	2.8	200	3.0	6.3
30 to 34 minutes	469	14.7	372	9.7	841	12.4	15.0
35 to 39 minutes	32	1.0	51	1.3	83	1.2	2.9
40 to 44 minutes	161	5.0	228	6.0	389	5.7	4.3
45 to 59 minutes	278	8.7	429	11.2	707	10.4	8.6
60 to 89 minutes	348	10.9	117	3.1	465	6.9	7.9
90 or more minutes	53	1.7	24	0.6	77	1.1	4.0
Total:	2,694	84.5	2,761	72.2	5,455	80.5	

Source: 2022 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 82: Percent of Local Employees With Commutes of More than 30 Minutes

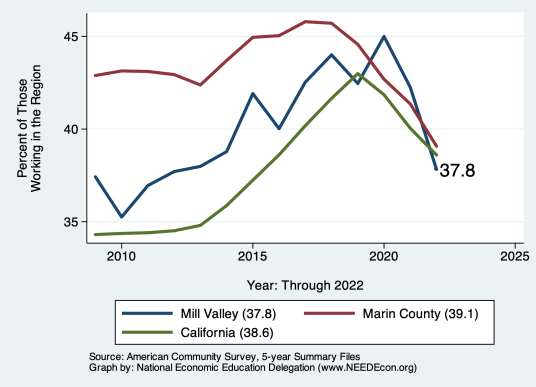


Figure 83: Percent of Local Employees With Commutes of More than 90 Minutes

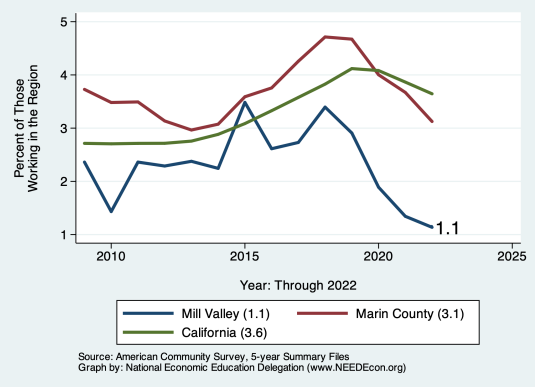
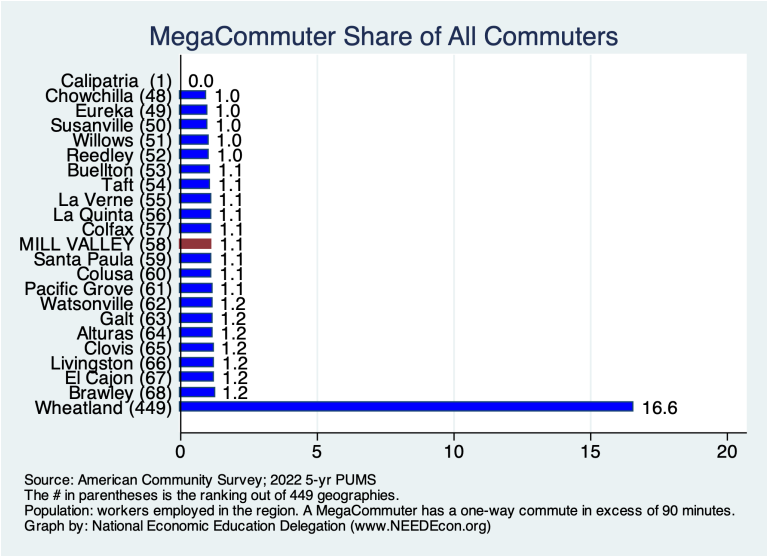


Figure 84: Rank: Share of MegaCommuters Across Similar Geographies



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Place of Work

This section provides evidence on where workers living in Mill Valley work. As evidenced in the first table, some of Mill Valley'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 Mill Valley 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:	3,620	92.3	2,952	87.7	6,572	91.0	99.6
Worked in county of residence	2,298	58.6	2,200	65.3	4,498	62.3	84.1
worked outside of county of residence	1,322	33.7	752	22.3	2,074	28.7	15.4
Worked outside state of residence	0	0.0	0	0.0	0	0.0	0.4
Total:	3,620	92.3	2,952	87.7	6,572	91.0	

Source: 2022 5-year American Community Survey, Summary File

Figure 85: Percent of Workers Employed Outside of Their County of Residence

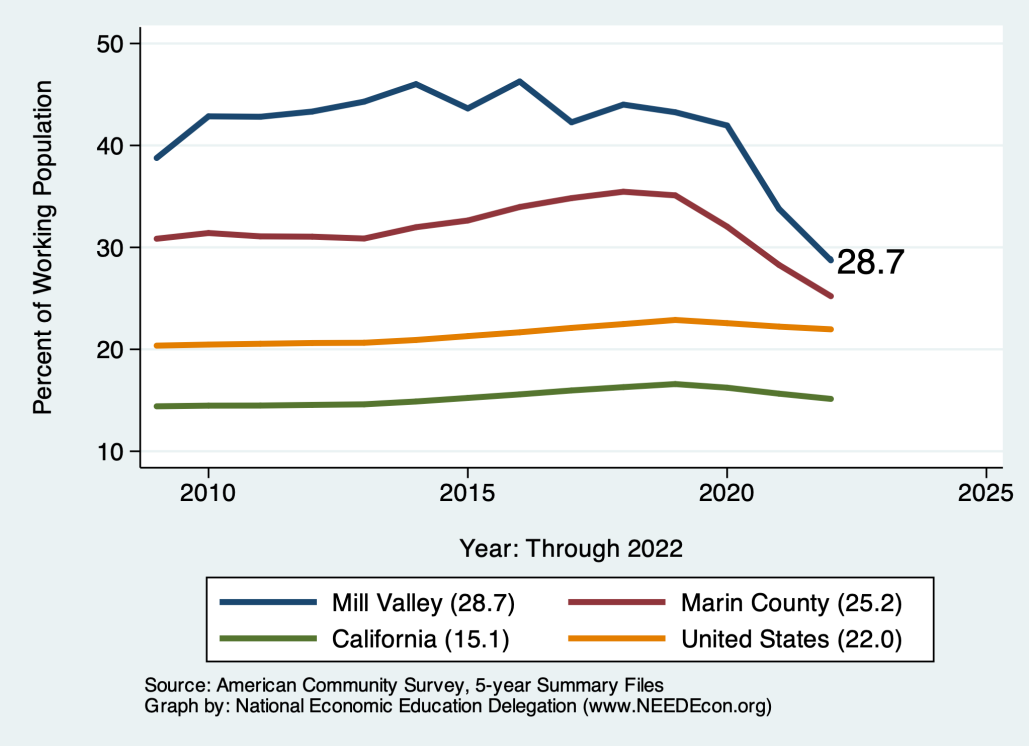
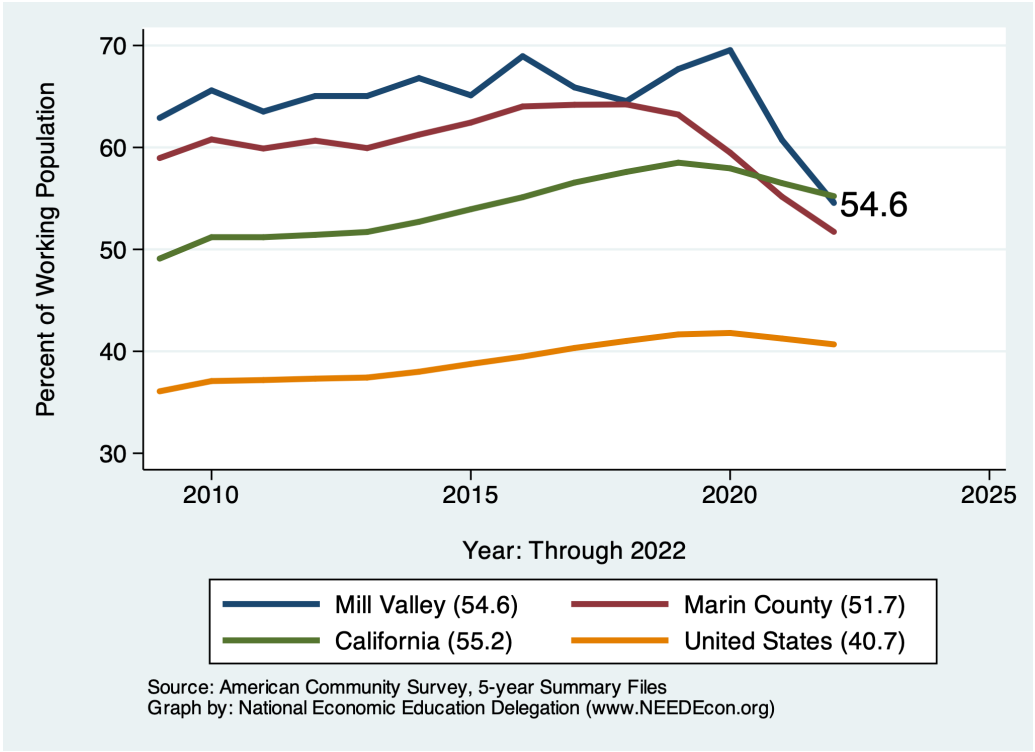


Table 11. SEX OF WORKERS BY PLACE OF WORK–PLACE LEVEL

Place of Work	Male #	Male (%)	Female #	Female (%)	All Workers #	All Workers (%)	All of CA (%)
Living in a place:	3,620	92.3	2,952	87.7	6,572	91.0	95.9
Worked in place of residence	1,314	33.5	1,319	39.2	2,633	36.5	39.5
Worked outside place of residence	2,306	58.8	1,633	48.5	3,939	54.6	56.4
Not living in a place	0	0.0	0	0.0	0	0.0	4.1
Total:	3,620	92.3	2,952	87.7	6,572	91.0	

Source: 2022 5-year American Community Survey, Summary File

Figure 86: 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	105,000	48,566	94.9	46,171	94.4
Car, truck, or van - carpooled	80,919	36,463	97.4	34,487	97.4
Public transportation (excluding taxicab)	153,125	40,179	167.3	45,100	141.0
Walked	77,596	29,366	116.0	27,142	118.7
Taxicab, motorcycle, bicycle, or other means	113,875	40,433	123.7	36,140	130.8
Worked from home	115,938	75,153	67.7	67,180	71.7
Total:	111,026	48,747	227.8	46,099	240.8

Source: 2022 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	511	31.3	609	31.6	2,236	51.3	3,490	48.3	68.4
Car, Truck, or Van: Carpooled	6	0.4	171	8.9	213	4.9	401	5.6	9.5
Public Transportation (excl Taxi)	0	0.0	48	2.5	333	7.6	381	5.3	3.6
Walked	86	5.3	28	1.5	172	3.9	305	4.2	2.4
Taxicab, Motorcycle, or other	21	1.3	21	1.1	86	2.0	128	1.8	2.4
Worked at Home	241	14.7	257	13.3	1,203	27.6	1,867	25.9	13.6
Total:	865	52.9	1,134	58.8	4,243	97.3	6,572	91.0	100.0

Source: 2022 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	942	27.9	1,461	56.0	1,637	50.0	4,295	55.7	68.5
Car, Truck, or Van: Carpooled	102	3.0	86	3.3	215	6.6	589	7.6	9.5
Public Transportation (excl Taxi)	26	0.8	51	2.0	13	0.4	162	2.1	3.6
Walked	144	4.3	28	1.1	154	4.7	326	4.2	2.4
Taxicab, Motorcycle, or other	21	0.6	9	0.3	53	1.6	83	1.1	2.4
Worked at Home	241	7.1	257	9.8	1,203	36.7	1,867	24.2	13.6
Total:	1,476	43.7	1,892	72.5	3,275		7,322	95.0	

Source: 2022 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	60	35.3	28	13.5	3,402	48.7	3,490	48.3	68.7
Car, Truck, or Van: Carpooled	6	3.5	0	0.0	395	5.7	401	5.6	9.5
Public Transportation (excl Taxi)	0	0.0	0	0.0	381	5.5	381	5.3	3.6
Walked	23	13.5	13	6.2	269	3.8	305	4.2	2.1
Taxicab, Motorcycle, or other	0	0.0	0	0.0	128	1.8	128	1.8	2.4
Worked at Home	15	8.8	41	19.7	1,811	25.9	1,867	25.9	13.6
Total:	104	61.2	82	39.4	6,386	91.4	6,572	91.0	

Source: 2022 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	192	37.6	195	37.6	3,908	55.2	4,295	55.6	68.7
Car, Truck, or Van: Carpooled	4	0.8	5	1.0	580	8.2	589	7.6	9.5
Public Transportation (excl Taxi)	12	2.3	0	0.0	150	2.1	162	2.1	3.6
Walked	23	4.5	13	2.5	290	4.1	326	4.2	2.1
Taxicab, Motorcycle, or other	0	0.0	0	0.0	83	1.2	83	1.1	2.4
Worked at Home	15	2.9	41	7.9	1,811	25.6	1,867	24.2	13.6
Total:	246	48.1	254	49.0	6,822	96.3	7,322	94.9	

Source: 2022 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 Mill Valley 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 87: Overall Movements of Residents

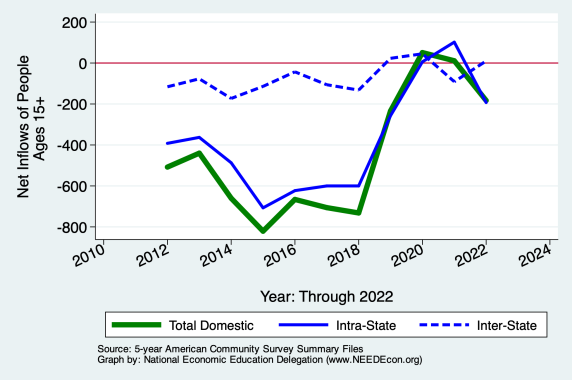


Table 17: Migration by Income

		Net Inflows				
			Same State			
Category	Population	All Migration	W/in County	Between Counties	Across States	From Abroad
No income	1,815	−48	−32	7	−47	24
With income	10,150	−33	−257	89	57	78
$1 to $9,999 or loss	908	−192	−39	−98	−57	2
$10,000 to $14,999	421	6	−27	16	4	13
$15,000 to $24,999	680	−24	10	−40	−22	28
$25,000 to $34,999	611	−6	2	−45	37	0
$35,000 to $49,999	660	−36	−60	29	−5	0
$50,000 to $64,999	737	34	0	54	−20	0
$65,000 to $74,999	446	−17	0	−45	28	0
$75,000 or more	5,687	202	−143	218	92	35
All:	11,965	−81	−289	96	10	102

Source: 2022 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 88: Overall Movements of Low Income Residents

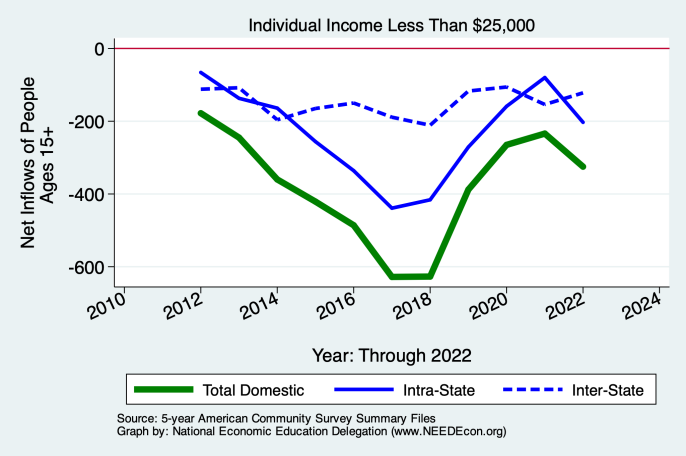


Figure 89: Overall Movements of Middle Income Residents

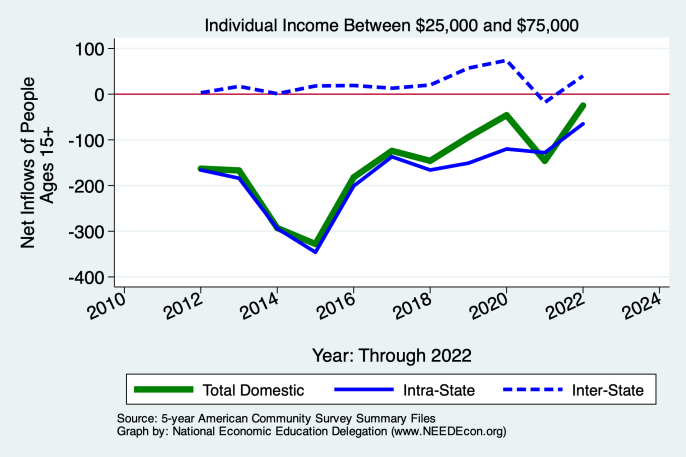
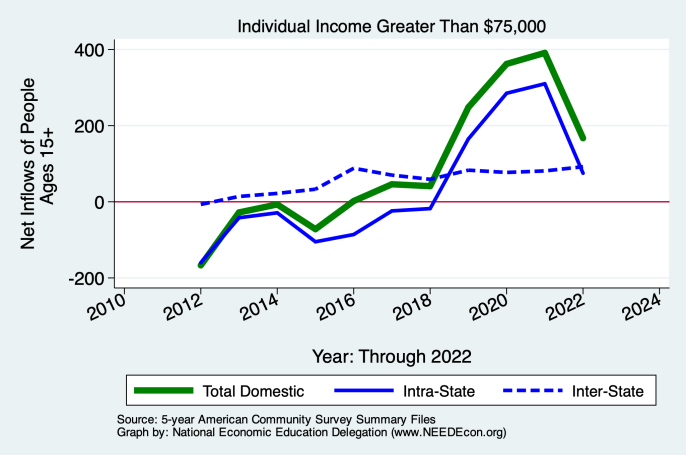


Figure 90: Overall Movements of High Income Residents



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Demographics of Migration Flows

Table 18: Migration by Marital Status

Category	Population	Net Inflows				
			Same State			
		All Migration	W/in County	Between Counties	Across States	From Abroad
Never married	3,356	−149	−112	−16	−64	43
Now married, except separated	6,487	201	−39	163	42	35
Divorced	1,440	−109	−76	−48	15	0
Separated	55	−51	−37	−14	0	0
Widowed	627	27	−25	11	17	24
Total:	11,965	−81	−289	96	10	102

Source: 2022 5-year American Community Survey, Summary File

Table 19: Migration by Tenure

Category	Population	Net Inflows				
			Same State			
		All Migration	W/in County	Between Counties	Across States	From Abroad
Householder lived in owner-occupied housing units	10,098	−149	−253	−45	73	76
Householder lived in renter-occupied housing units	3,981	354	−79	315	94	24
Total:	14,079	205	−332	270	167	100

Source: 2022 5-year American Community Survey, Summary File

Figure 91: Domestic Movements of Residents by Tenure

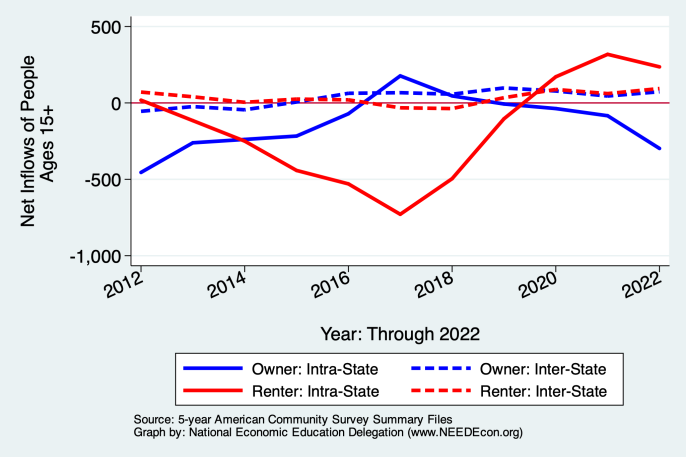

Table 20: Migration by Age

Category	Population	Net Inflows				
		All Migration	Same State		Across States	From Abroad
			W/in County	Between Counties		
1 to 4 years	475	−27	0	−10	−17	0
5 to 17 years	2,494	39	−117	108	48	0
18 and 19 years	263	−157	22	−71	−108	0
20 to 24 years	517	−140	−57	−120	−6	43
25 to 29 years	571	53	−33	63	23	0
30 to 34 years	704	26	42	−24	8	0
35 to 39 years	635	128	1	127	0	0
40 to 44 years	913	78	−30	23	85	0
45 to 49 years	1,315	4	9	5	−10	0
50 to 54 years	1,219	−34	−29	8	−13	0
55 to 59 years	1,174	−57	−90	0	33	0
60 to 64 years	838	64	16	28	20	0
65 to 69 years	894	−83	−59	−16	−8	0
70 to 74 years	807	35	0	0	0	35
75 years and over	1,330	4	−29	23	−14	24
Total Population:	14,149	−67	−354	144	41	102

Source: 2022 5-year American Community Survey, Summary File

Table 21: Migration by Educational Attainment

Category	Population	Net Inflows				
		All Migration	Same State		Across States	From Abroad
			W/in County	Between Counties		
Less than high school graduate	106	−18	−48	6	0	24
High school graduate (includes equiv)	688	19	23	−16	12	0
Some college or assoc. degree	1,712	141	47	54	40	0
Bachelor's degree	4,017	−40	−145	155	−50	0
Graduate or professional degree	3,877	116	−79	38	122	35
Total:	10,400	218	−202	237	124	59

Source: 2022 5-year American Community Survey, Summary File

Table 22: Median Income of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	86,658	86,658
Moved Within Same County	95,208	89,083
Moved to Different County, Same State	106,875	58,807
Moved Between States	83,981	21,181
Total Population:	88,545	84,519

Source: 2022 5-year American Community Survey, Summary File

Table 23: Median Age of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	49.3	49.3
Moved Within Same County	35.3	42.4
Moved to Different County, Same State	36.3	33.4
Moved Between States	41.1	19.6
Moved from Abroad	70.2	
Total Population:	47.2	47.5

Source: 2022 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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