

# Appendix J

## Regional Growth Forecast

### **Appendix Contents**

Introduction

Overview of Forecasted Growth

Regionwide Projections

Collaboration with the San Diego County Water Authority

# Regional Growth Forecast

## Introduction

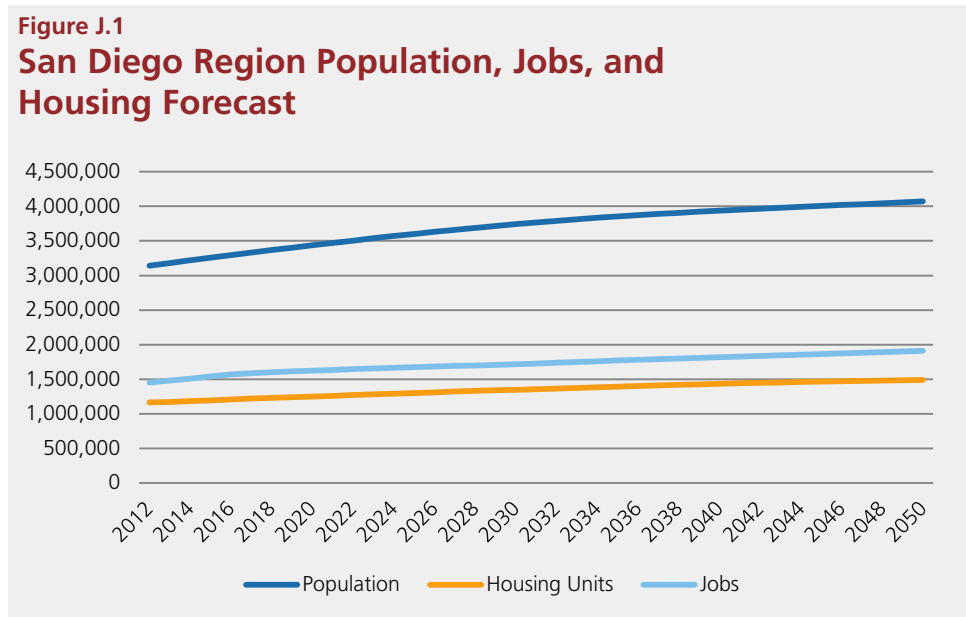
Since 1972, the San Diego Association of Governments (SANDAG) has produced long-range forecasts of population, housing, and employment that are used as a basic resource by elected officials, planners, academics, and the general public. Among other applications (including general plans and infrastructure planning), the Series 13 Regional Growth Forecast is the basis for San Diego Forward: The Regional Plan, including its Sustainable Communities Strategy (SCS).

These forecasts represent the best assessment of the changes we can anticipate for the region and its communities based on the best available information and well-proven, verified computer models. As explained below, they are based on the most recent planning assumptions, considering local general plans and other factors, per Senate Bill 375 Government Code Section 65080(b)(2)(B).

The SANDAG forecasts are meant to help policy- and decision-makers prepare for the future and are not an expression for or against growth. The forecasts are developed through a collaborative effort with experts in demography, housing, the economy and other disciplines, and the close cooperation of the local planning directors and their staff.

## Overview of Forecasted Growth

Between 2012 and 2050, the San Diego region is expected to grow by nearly 1 million people. This forecast is consistent with previous expectations although future growth rates have been reduced due to increased domestic migration out of the region. The growth in population will drive job growth and housing demand within the region – adding 460,000 jobs and more than 325,000 housing units.<sup>1</sup> Figure J.1 provides a summary of current population, housing units, and job statistics, as well as future trends for interim years and the forecast horizon.



## Forecast process

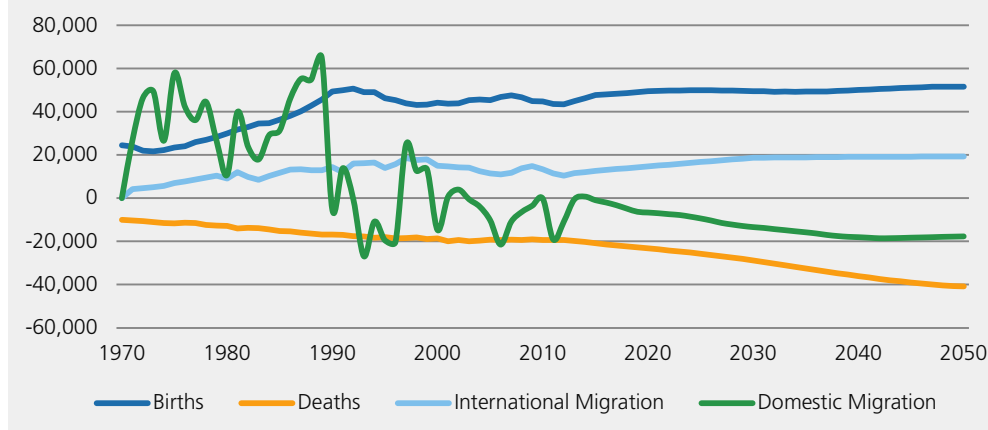
The forecast process includes two iterative phases. First, a forecast for the entire region is produced based largely on economic and demographic trends. The second phase allocates the forecasted growth down to the jurisdictions and smaller geographic areas. The subregional forecast model distributes growth based on a variety of factors including available capacity for housing and accessibility to jobs and transportation; however, it does not allocate growth beyond what is allowed for by any jurisdiction’s general plan. Therefore, the forecast allocation is influenced by local land use and transportation policy decisions (see Subregional Projections section). Actions taken by one jurisdiction can affect not only that jurisdiction’s forecast, but potentially others as well.

## Regionwide Projections

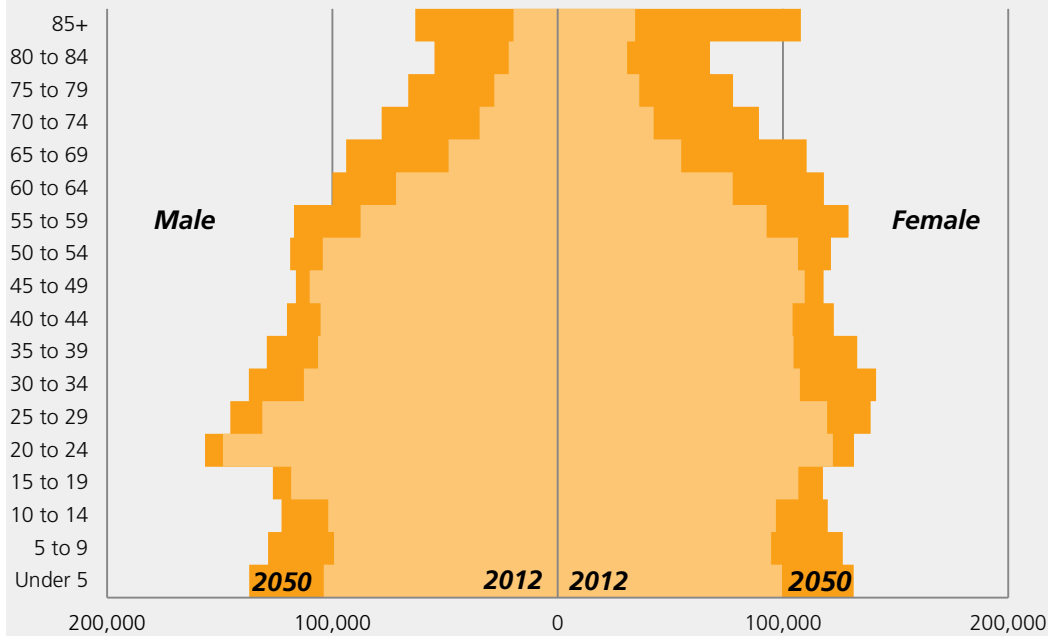
During the 38-year forecast period, the general trend for population growth is positive, but slowing considerably when compared with past trends. Currently, estimates from the California Department of Finance suggest that the San Diego region is growing at a rate of approximately 1.3 percent per year, or an average of approximately 30,000 people per year,<sup>2</sup> and SANDAG projections show that the growth rate will slow to less than 1 percent per year by 2021, and to less than 0.5 percent in the mid-2030s.

While San Diego has long been thought of as a region of “transplants” where more than half of the residents were born outside of the State of California, future growth is expected to be largely homegrown. Given longer life expectancies and trends in fertility rates, natural increase (births minus deaths) is projected to account for nearly two-thirds of future population growth (as shown in Figure J.2). Because most of the region’s future growth is expected to be due to natural increase (births minus deaths), the region’s relatively slow growth rate can be attributed, in part, to a continual decline in fertility rate (the average number of children born to each woman). Recent data show that this is occurring across most ethnic groups, and that the Hispanic population is experiencing the sharpest decline.<sup>3</sup> Longer life expectancies will contribute to the aging population seen in the outer years of the forecast, while the trends of increased deaths (as a result of the older population) and net out-migration will factor into the slower growth rates anticipated in the future.<sup>4</sup> By 2050 it is expected that nearly 20 percent of the population will be age 65 and over, compared with just 12 percent today (as is shown in Figure J.3). The remaining growth is the result of net migration, both domestic and international. The amount of legal foreign immigration is controlled by the federal government and has remained fairly consistent over the past decade. No major change in immigration levels is expected in the foreseeable future. Domestic migration – people moving to and from other parts of the state or nation – fluctuates each year, usually based on the condition of the local economy.

**Figure J.2**  
**Components of Population Change**  
**(Births, Deaths, and Migration)**



**Figure J.3**  
**San Diego Region Population**  
**by Age and Gender**



In terms of the race and ethnic composition of the region, significant changes are on the horizon. The 2010 census revealed San Diego to now be a “majority-minority” region – meaning no single race or ethnic group comprises more than 50 percent of the total population. In 2012 the two dominant race and ethnic groups were non-Hispanic whites and Hispanics, accounting for 47 percent and 33 percent of the region’s total population, respectively. By 2050, however, it is expected that Hispanics will account for more than 46 percent of the total population while the non-Hispanic White population will decline to approximately 30 percent. The Asian population is expected to increase to 16 percent; up from 11 percent in 2012. Non-Hispanic blacks, two or more races, and groups in the “other” category each comprise less than 5 percent of the total population today and are expected to remain relatively unchanged out to 2050.<sup>5</sup>

It is important to emphasize that while the region’s rate of population growth is slowing, the region is still growing. As we plan for the future, the forecasts provide a tool that can aid in the formulation of local and regional policies.

### Subregional projections

SANDAG staff worked extensively with the region’s 18 cities, the County of San Diego, and other agencies that manage land use (e.g., the Department of Defense, tribal governments) to understand local land use plans and policies, including general plans, community plans, or specific plans, as well as constraints to development. That detailed land use information is incorporated into the future development and redevelopment projections that comprise the Series 13 Regional Growth Forecast.

The local land use inputs incorporate such information as existing development, general plans, constraints to development (e.g., floodplains, steep slopes, habitat preserves, historic districts, etc.), and permitted projects in the development pipeline. The final building blocks of the subregional forecast are proximity to existing job centers (along with travel time and commute choice information), and historical development patterns. These four key inputs influence the probability of a neighborhood’s future growth.

## **Changing local plans**

This forecast represents a continuing trend in the San Diego region to provide more housing and job opportunities in the existing urbanized areas of the region. Since 1999, more than three-quarters of the 19 jurisdictions have made or are in the process of making significant updates to their general plans. In 1999, SANDAG projected 21 percent of future housing growth would occur in the unincorporated areas of the county under the local general plans at the time. Today, SANDAG expects 17 percent of growth to occur in the unincorporated areas; much of that is focused in existing villages such as Lakeside, Valley Center, Ramona, and Alpine. As a result of these updates, the jurisdictions' general plans provide sufficient housing opportunities in the existing general plans.

The forecasted growth also reflects local general plans that have become more and more sustainable over time; this trend can be expected to continue. At the turn of the century, about 90 percent of vacant residential land in the cities was planned for single family use. The Series 13 Forecast shows 82 percent of housing growth by 2050 being multifamily. Local and regional conservation programs also continue to protect more of San Diego's sensitive lands. Currently, over 50 percent of the region is preserved as open space, parks, or habitat and SANDAG forecasts that an additional 20,000 acres will be preserved by 2050.<sup>6</sup> Figures J.4 through J.6 show the 2020, 2035, and 2050 land uses, respectively.

## **General intensification of existing uses**

As a result of changing local plans, SANDAG forecasts a general intensification of existing land uses within urban communities and along key transportation corridors. For example, National City's general plan update results in opportunities for over 10,000 additional multifamily units near the Blue Line Trolley and planned trolley connecting San Ysidro and UTC via National City. San Marcos has drafted Specific Plans for the San Marcos Creek and University districts adding mixed use developments near Cal State-San Marcos and the SPRINTER Rail Corridor. This information was provided by these local jurisdictions to SANDAG in the land use inputs that reflect the jurisdictions' general plans. Finally, over half of the growth in new housing will occur in the city of San Diego. Downtown will continue to thrive over the next few decades and the growth will start to spill over into areas of Barrio Logan, Golden Hill, and Uptown communities. Figure J.7, Figure J.8, and Figure J.9 illustrates the 2020, 2035, and 2050 transit network and higher density land uses, respectively.

In terms of jobs, SANDAG expects the existing employment centers to continue to thrive. The University Towne Centre (UTC) / Sorrento Valley / Torrey Mesa employment cluster will continue to be the largest job center in the region. SANDAG expects downtown to add another 30,000 jobs by 2050. The Otay Mesa border area will become a much larger job center growing from just over 15,000 jobs today to over 45,000 by 2050. Finally, Chula Vista will add nearly 50,000 new jobs as the Chula Vista Bayfront, downtown investments, and new planned communities in eastern Chula Vista come online. Figures J.10 through J.12 show the 2020, 2035, and 2050 housing and employment density, respectively.

Tables J.1 through J.3 present base year and forecasted population, employment, and housing data for the 19 local jurisdictions, respectively.

## **Collaboration with the San Diego County Water Authority**

For decades, SANDAG and the San Diego County Water Authority (Water Authority) have been collaborating on the forecasting process. Under the terms of a 1992 Memorandum of Agreement between SANDAG and the Water Authority, the Water Authority uses the SANDAG official forecast, which is based on local land use jurisdictions' general plans and policies, to project consumptive water demands for the region. This coordination ensures linkage between local jurisdictions' general plans and the Water Authority's projected water demands. It also ensures that the Water Authority is identifying the appropriate mix of resources to meet the existing and future growth within the region.

Since the mid-1990s, the Water Authority has used an econometric model to develop its long-range Municipal and Industrial (M&I) demand forecasts. This computer model is based on the U.S. Army Corps of Engineers Municipal And Industrial Needs (MAIN) model. The Water Authority's version of the model, known as CWA-MAIN, was modified by a consultant to reflect the San Diego region's unique parameters. The CWA-MAIN model relates historic water demand patterns to variables such as household income, consumer response to the price of water, and weather, to predict future M&I water demands. These datasets are compiled from various sources, including SANDAG and Water Authority member agencies. SANDAG demographic and economic projections (i.e., housing units, household density, household size, and employment counts) are incorporated into the CWA-MAIN model. The Water Authority also coordinates with the Scripps Institution of Oceanography to prepare a water demand scenario taking into account climate change – knowing that our historic weather isn't indicative of the future.

The forecast also incorporates the long-term state conservation mandate (SBX7-7), which requires retail agencies to meet a 20 percent reduction in their per capita potable water use by 2020. Compliance with SBX7-7 can be through a wide range of actions such as development of recycled water supplies, retail water pricing, and traditional conservation programs. A separate forecast model is used to project member agency level agricultural demands. Forecast driver variables include irrigated acreage within the Water Authority's service area, estimated crop type distribution, and calculated historic water use factors.

**Table J.1**  
**Series 13 Regional Growth Forecast Population by Jurisdiction**

Jurisdictions	2012	2020	2035	2050	Change (2012-2050)	
					Number	Percent
Carlsbad	107,674	118,450	124,351	124,518	16,844	16%
Chula Vista	249,382	287,173	326,625	345,586	96,204	39%
Coronado	23,187	23,634	24,165	24,219	1,032	4%
Del Mar	4,194	4,399	4,672	4,732	538	13%
El Cajon	100,562	102,761	109,383	115,465	14,903	15%
Encinitas	60,346	62,908	65,264	66,670	6,324	10%
Escondido	146,057	165,095	172,697	173,430	27,373	19%
Imperial Beach	26,609	27,506	30,369	31,691	5,082	19%
La Mesa	58,296	61,102	70,252	77,881	19,585	34%
Lemon Grove	25,603	26,884	28,673	30,903	5,300	21%
National City	58,967	62,342	73,329	85,121	26,154	44%
Oceanside	169,319	177,840	188,597	189,377	20,058	12%
Poway	48,382	50,026	53,062	53,149	4,767	10%
San Diego	1,321,315	1,453,267	1,665,609	1,777,936	456,621	35%
San Marcos	85,560	98,915	109,095	113,015	27,455	32%
Santee	54,643	59,497	63,812	66,313	11,670	21%
Solana Beach	13,000	13,376	14,207	14,870	1,870	14%
Vista	95,034	96,993	111,771	126,455	31,421	33%
Unincorporated	495,299	543,545	617,765	647,428	152,129	31%
Region	3,143,429	3,435,713	3,853,698	4,068,759	925,330	29%

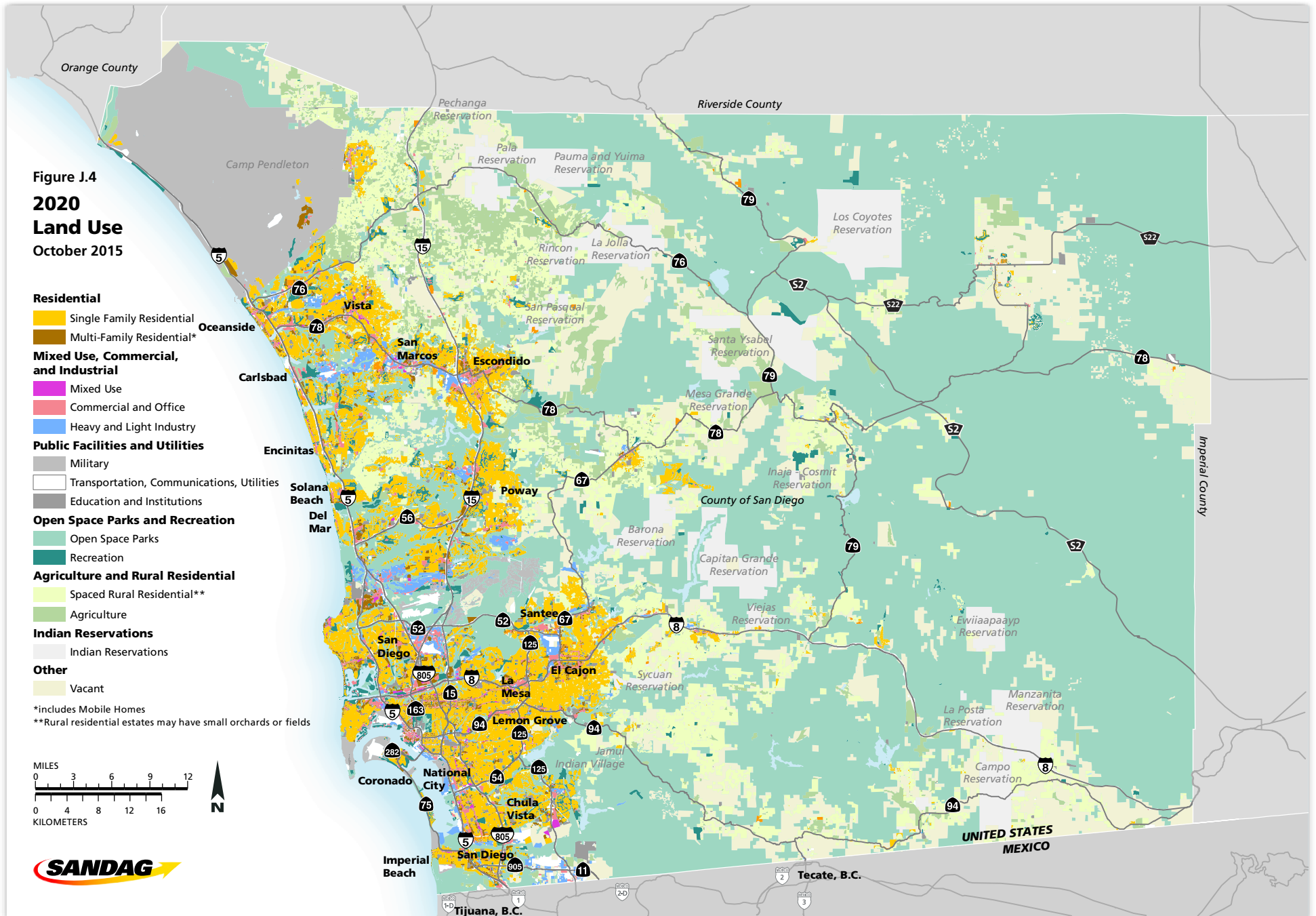
**Table J.2****Series 13 Regional Growth Forecast Total Civilian Jobs by Jurisdiction**

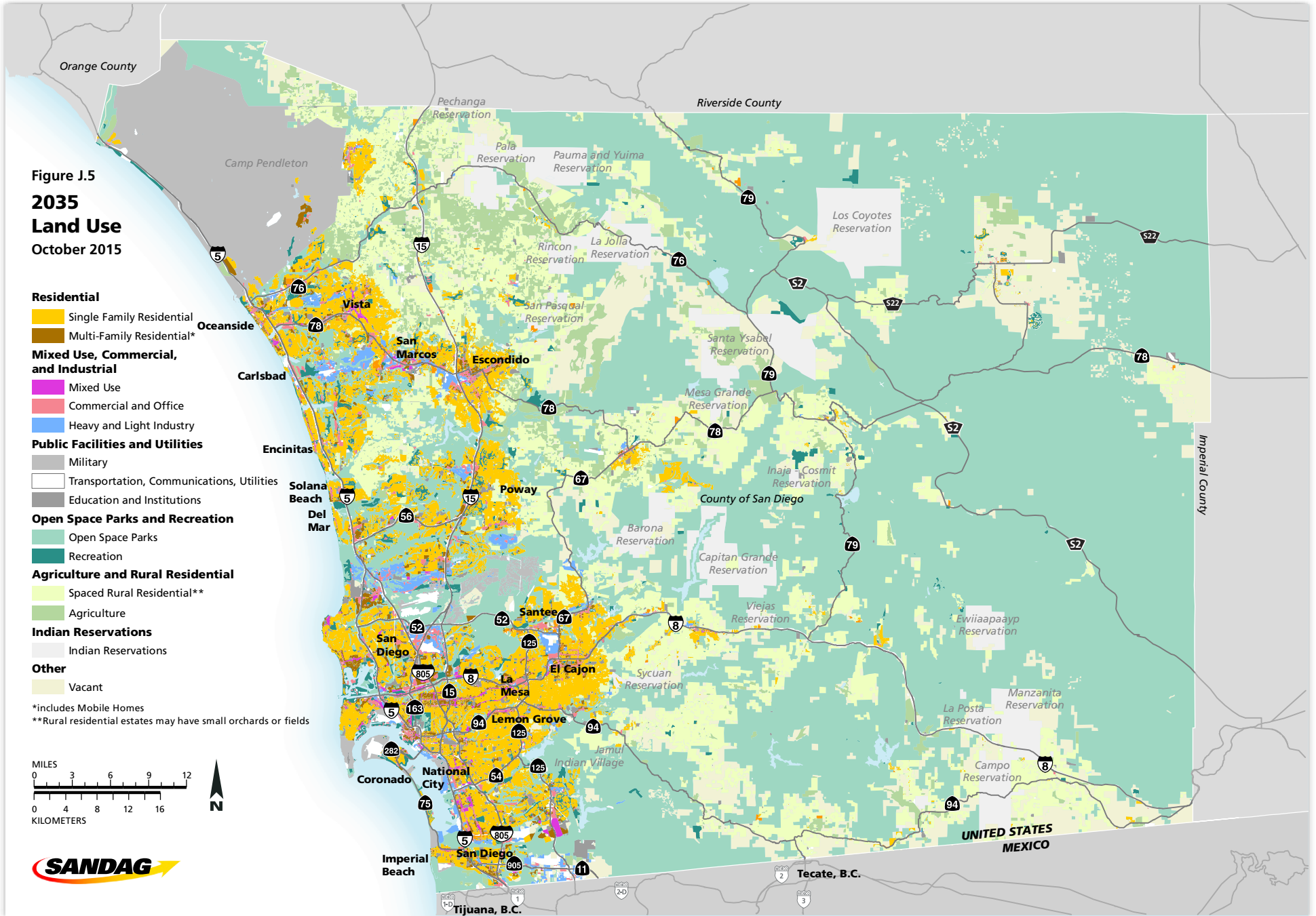
Jurisdictions	2012	2020	2035	2050	Change (2012-2050)	
					Number	Percent
Carlsbad	66,279	77,422	84,589	85,757	19,478	29%
Chula Vista	65,340	82,953	99,599	114,550	49,210	75%
Coronado	12,377	12,377	12,515	12,536	159	1%
Del Mar	4,521	4,542	4,704	4,726	205	5%
El Cajon	38,393	41,410	45,201	49,825	11,432	30%
Encinitas	26,165	27,275	28,467	29,551	3,386	13%
Escondido	48,844	53,498	57,732	59,081	10,237	21%
Imperial Beach	3,421	4,311	4,595	4,613	1,192	35%
La Mesa	25,233	28,673	33,309	36,552	11,319	45%
Lemon Grove	6,774	7,320	8,033	8,656	1,882	28%
National City	22,270	25,184	27,714	34,736	12,466	56%
Oceanside	41,980	48,205	53,283	53,998	12,018	29%
Poway	30,851	34,010	35,708	37,173	6,322	20%
San Diego	742,718	830,107	896,404	971,259	228,541	31%
San Marcos	37,608	45,783	54,902	64,328	26,720	71%
Santee	14,519	16,499	18,323	18,570	4,051	28%
Solana Beach	7,568	8,156	8,533	8,803	1,235	16%
Vista	35,840	40,965	48,065	48,814	12,974	36%
Unincorporated	116,268	131,490	144,318	163,933	47,665	41%
Region	1,346,969	1,520,180	1,665,994	1,807,461	460,492	34%

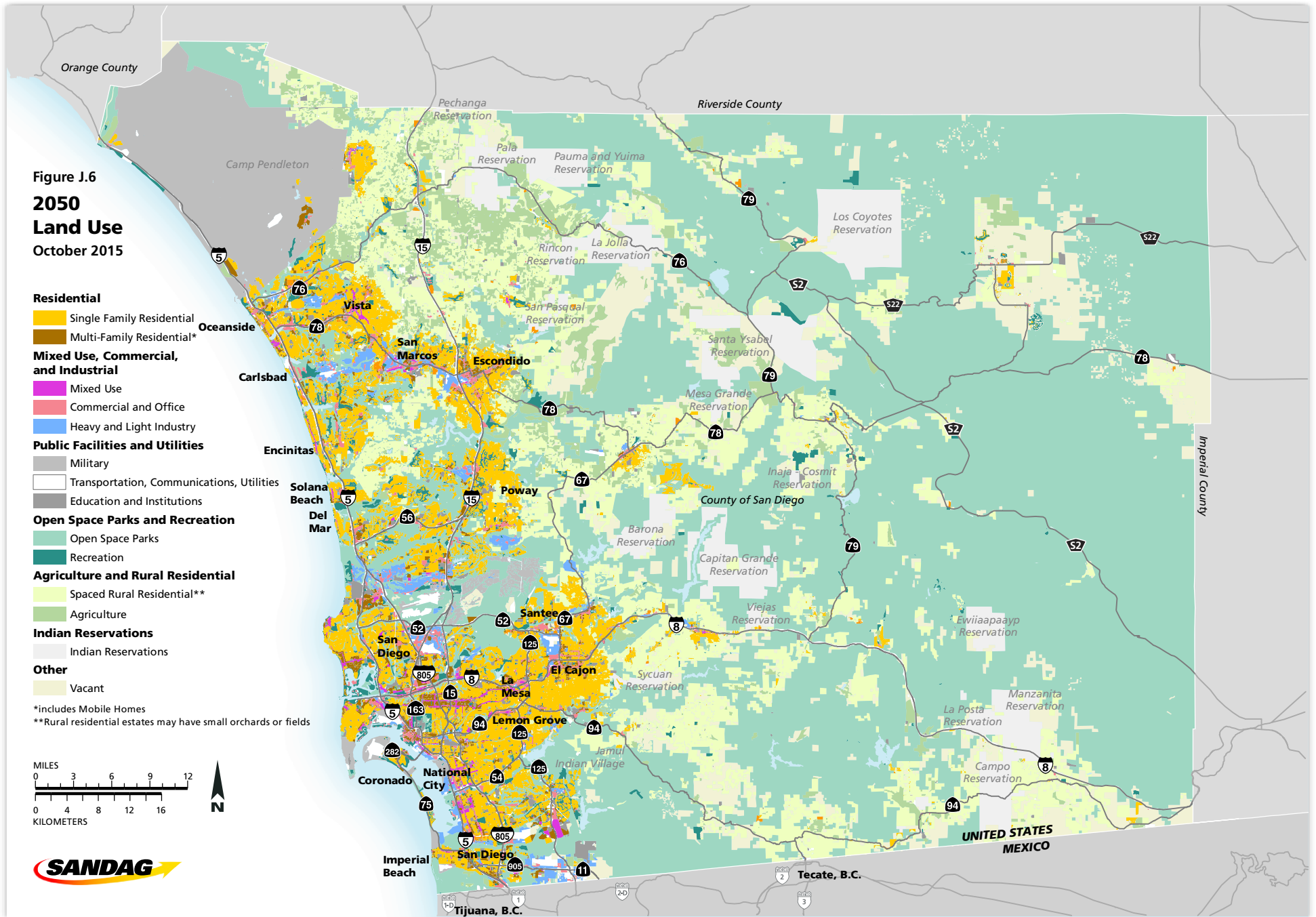


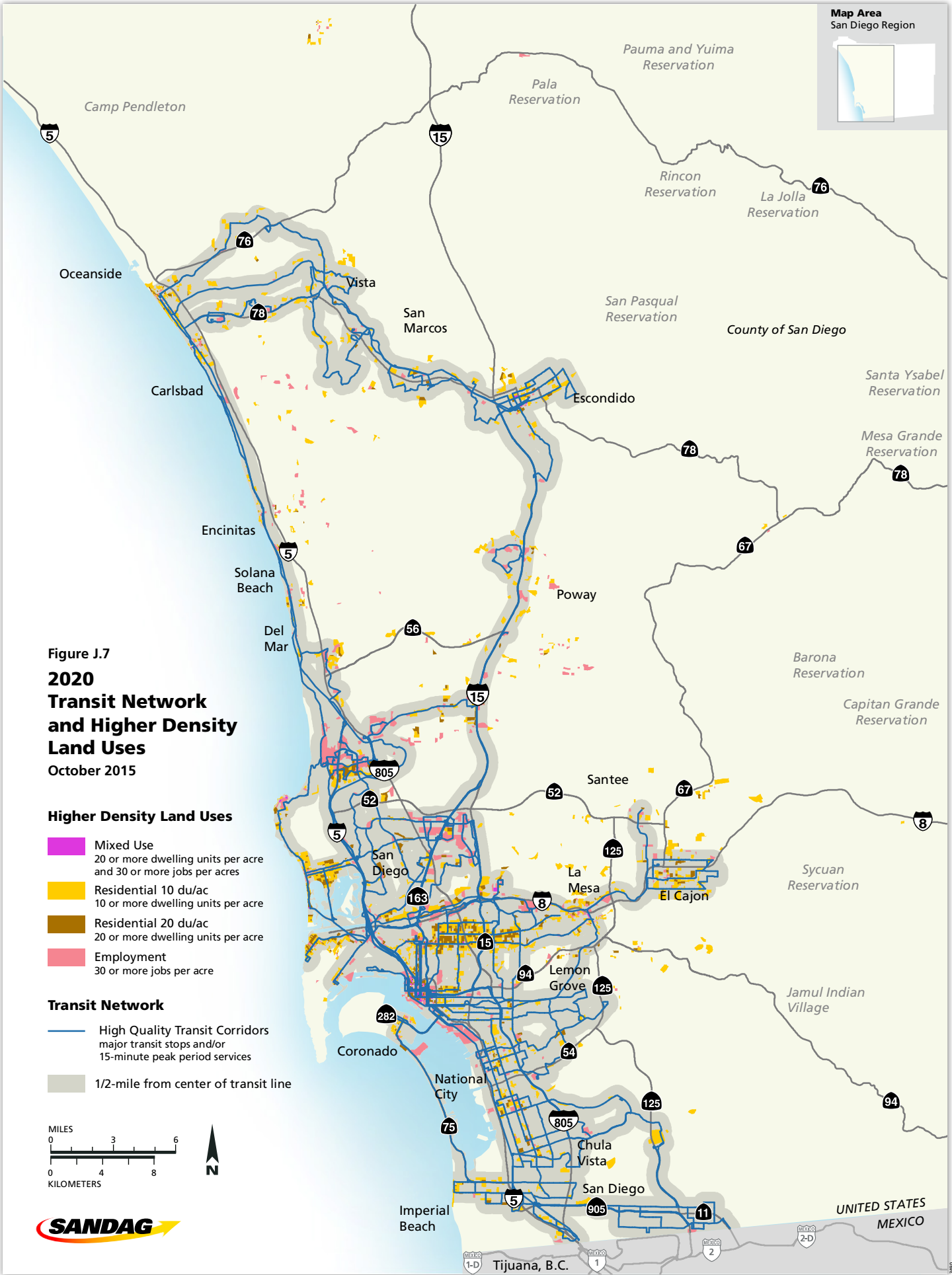
**Table J.3****Series 13 Regional Growth Forecast Total Housing Units by Jurisdiction**

Jurisdictions	2012	2020	2035	2050	Change (2012-2050)	
					Number	Percent
Carlsbad	45,171	48,448	50,261	50,505	5,334	12%
Chula Vista	79,255	89,176	101,188	108,273	29,018	37%
Coronado	9,596	9,668	9,697	9,801	205	2%
Del Mar	2,637	2,646	2,653	2,674	37	1%
El Cajon	35,934	36,180	38,163	40,758	4,824	13%
Encinitas	25,586	26,146	26,765	27,686	2,100	8%
Escondido	48,333	53,564	55,567	56,034	7,701	16%
Imperial Beach	9,863	10,001	10,926	11,528	1,665	17%
La Mesa	25,840	26,460	30,001	33,407	7,567	29%
Lemon Grove	8,813	9,118	9,654	10,526	1,713	19%
National City	16,720	17,458	20,877	24,736	8,016	48%
Oceanside	65,469	67,817	70,395	70,942	5,473	8%
Poway	16,545	16,855	17,685	17,839	1,294	8%
San Diego	518,137	559,143	640,668	695,703	177,566	34%
San Marcos	28,539	32,625	35,795	37,337	8,798	31%
Santee	20,124	21,490	22,776	23,886	3,762	19%
Solana Beach	6,521	6,583	6,833	7,121	600	9%
Vista	30,860	31,012	35,307	40,181	9,321	30%
Unincorporated	171,875	185,294	209,572	222,998	51,123	30%
Region	1,165,818	1,249,684	1,394,783	1,491,935	326,117	28%









**Figure J.7**  
**2020**  
**Transit Network**  
**and Higher Density**  
**Land Uses**  
October 2015

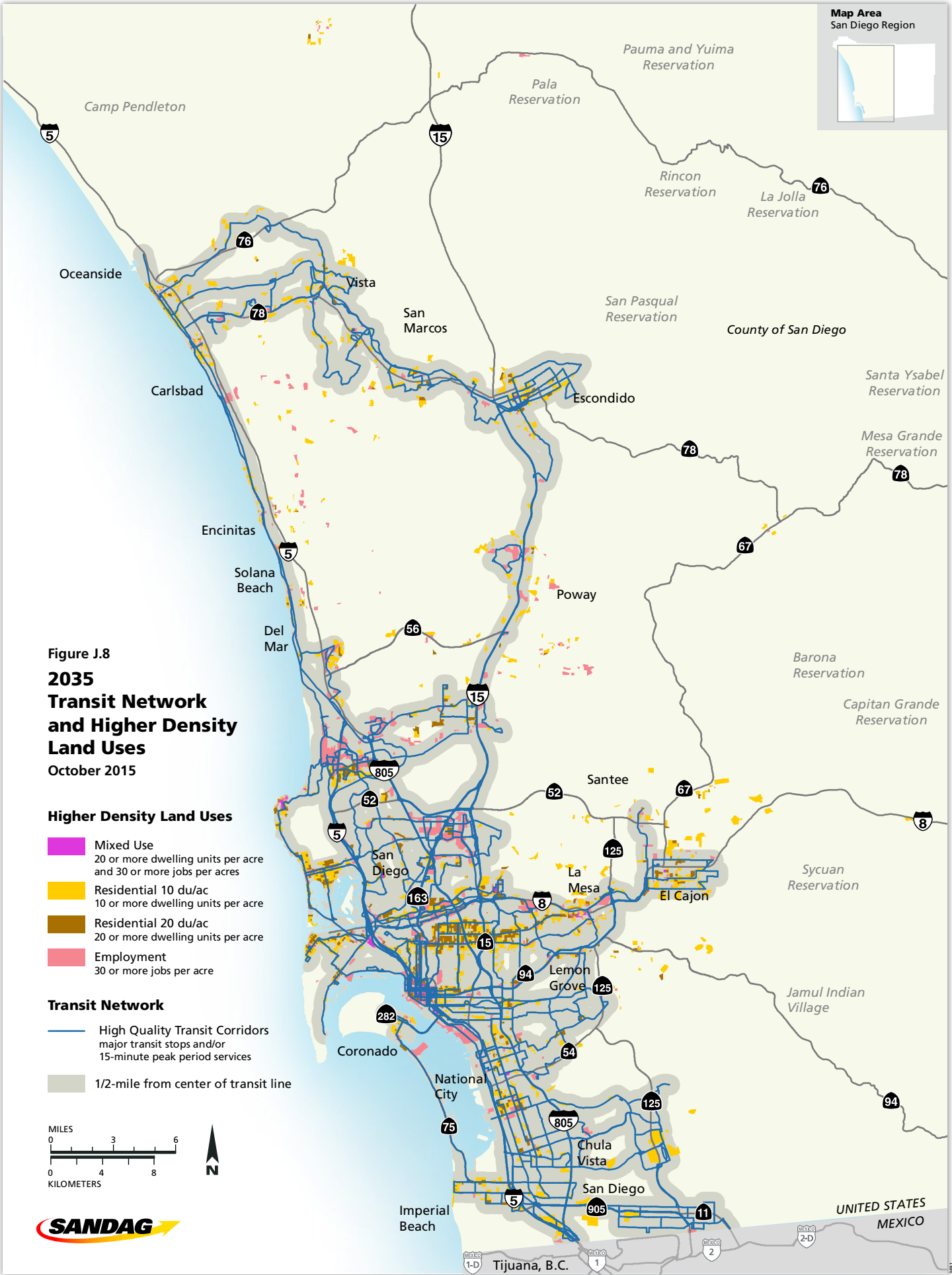
**Higher Density Land Uses**

- Mixed Use  
20 or more dwelling units per acre  
and 30 or more jobs per acres
- Residential 10 du/ac  
10 or more dwelling units per acre
- Residential 20 du/ac  
20 or more dwelling units per acre
- Employment  
30 or more jobs per acre

**Transit Network**

- High Quality Transit Corridors  
major transit stops and/or  
15-minute peak period services
- 1/2-mile from center of transit line





**Figure J.8**  
**2035**  
**Transit Network**  
**and Higher Density**  
**Land Uses**  
October 2015

**Higher Density Land Uses**

- Mixed Use  
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and 30 or more jobs per acres
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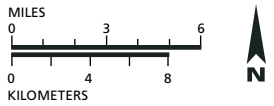
**Figure J.9**  
**2050**  
**Transit Network**  
**and Higher Density**  
**Land Uses**  
 October 2015

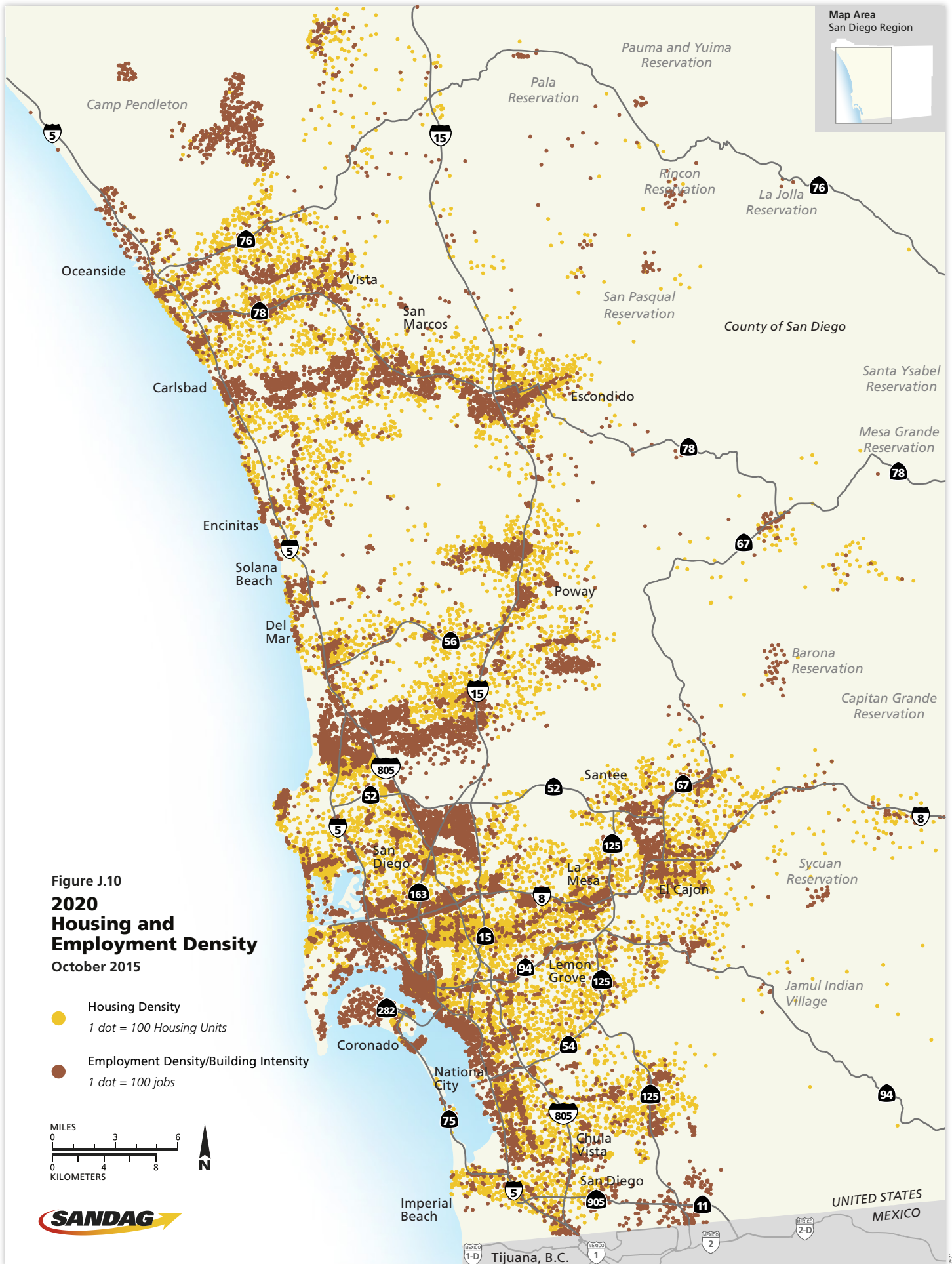
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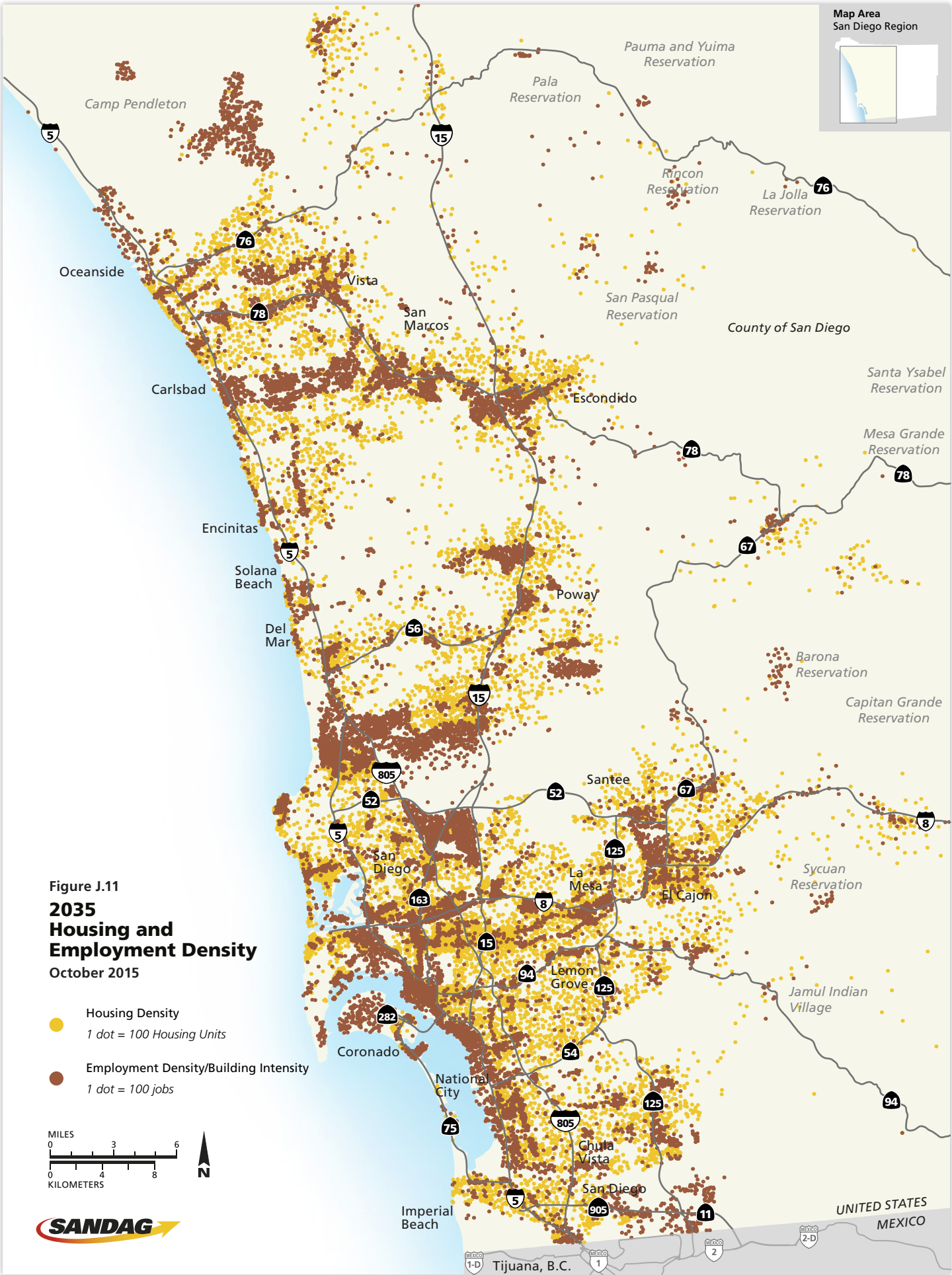
**Transit Network**

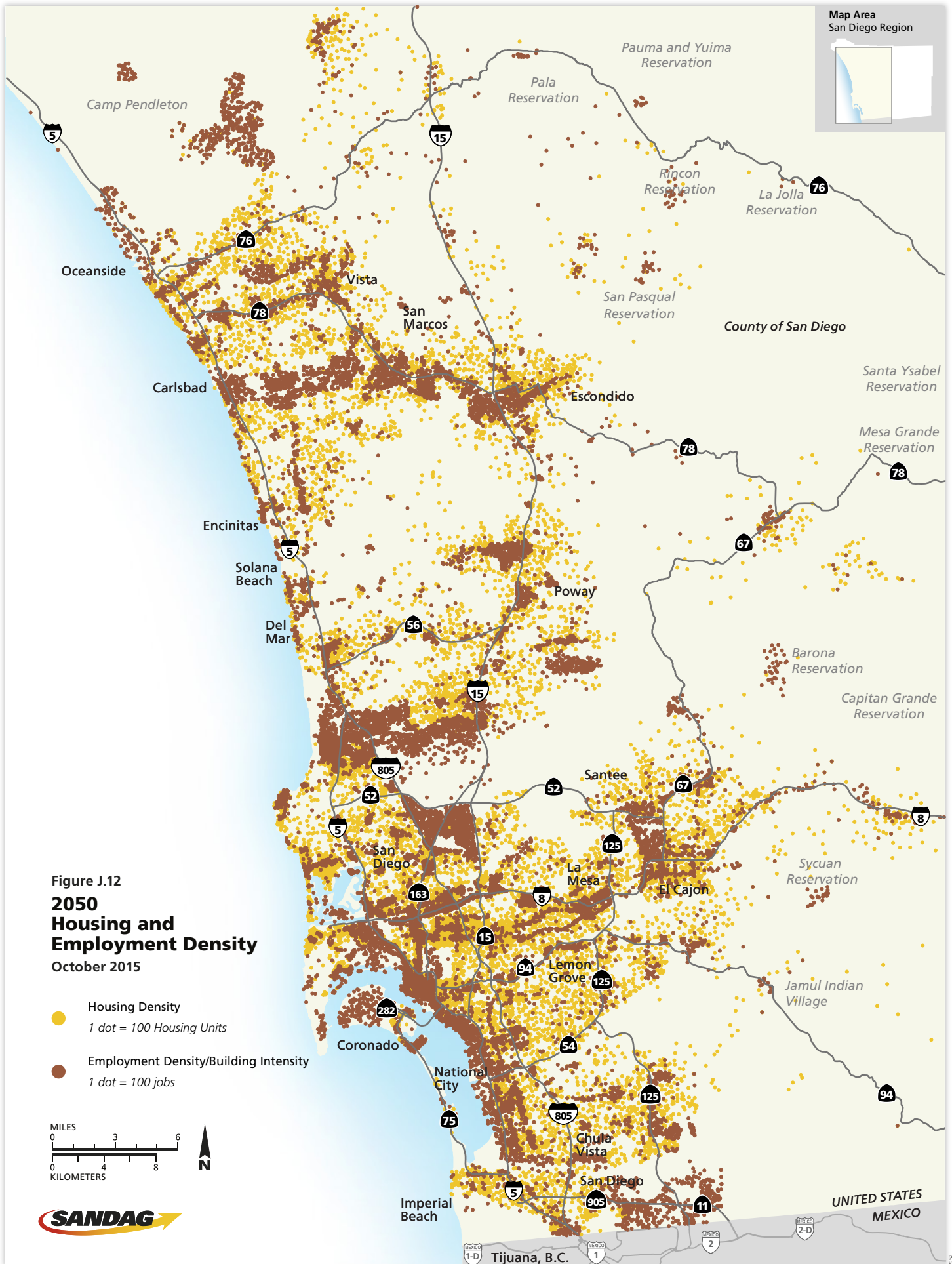
- High Quality Transit Corridors  
major transit stops and/or  
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- 1/2-mile from center of transit line











## Endnotes

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- <sup>1</sup> SANDAG Series 13 Regional Growth Forecast.
- <sup>2</sup> State of California, Department of Finance, *E-4 Population Estimates for Cities, Counties, and the State, 2011-2014, with 2010 Census Benchmark*. Sacramento, California, May 2014.
- <sup>3</sup> State of California, Department of Public Health, *General Fertility Rates, Total Fertility Rates, and Birth Rates by Age and Race/Ethnic Group of Mother, California, 2005-2009*.
- <sup>4</sup> U.S. Census Bureau, *Projected Life Expectancy at Birth by Sex, Race, and Hispanic Origin for the United States*, December 2012.
- <sup>5</sup> SANDAG Series 13 Regional Growth Forecast.
- <sup>6</sup> SANDAG Series 13 Regional Growth Forecast.