CHAPTER 3
REGIONAL TRENDS THROUGH 2030:
HOW ARE WE GROWING AND CHANGING?

DEMOGRAPHICS

The San Diego region has resumed its familiar pattern of growth. Since the recession ended in the mid-1990s, population growth in the region has averaged about 50,000 persons per year. The current annual growth rate of about two percent is higher than that of the nation as a whole; although for the entire 1990s we grew slower than the nation. SANDAG's 2030 Regional Growth Forecast projects that between 2000 and 2030 the region will add about one million more people, 340,000 new homes, and a half-million new jobs.

In spite of those figures, our growth rate is actually slowing, and that trend will continue. During the late 1980s the region was adding as many as 90,000 persons per year, an annual growth rate of three percent. By the mid-2020s, our growth rate will fall below the national rate of about one percent. Currently, Riverside County, Imperial County, and Tijuana are all growing at faster rates than San Diego.

All population growth comes from just two sources: natural increase (births minus deaths), and net migration (people who move here minus those who move away). Migration consists of two components: domestic migration and foreign immigration. The amount of legal foreign immigration is controlled by the federal government, and has remained fairly constant 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 the nation — fluctuates each year, usually based on the condition of the local economy. During the recession years in the early 1990s, for example, more people left the region to search for economic opportunities elsewhere. Figure 3.1 compares the region's historic and future growth rates to those of the nation.

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FIGURE 3.1—POPULATION GROWTH RATE
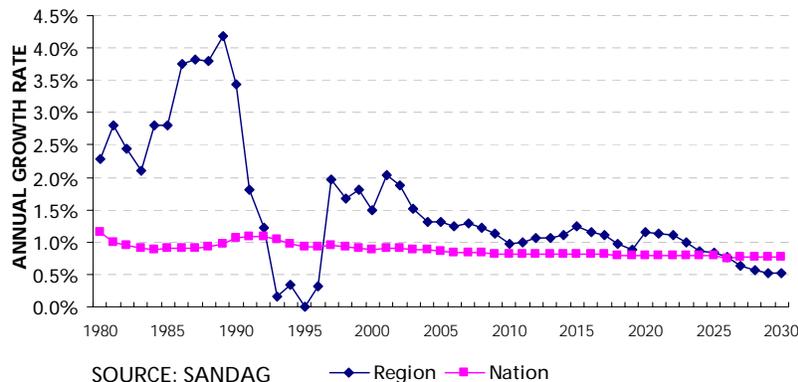
SOURCE: SANDAG ◆ Region ■ Nation

As the region grows over the next 30 years, some basic demographic characteristics of the population will change. As a group, we will become both older and more ethnically diverse.

The main reason our growth rate is slowing is a continuing decline in fertility rates (the average number of children born to each woman). Recent data show that this is occurring across most ethnic groups, and that the sharpest drop is seen among the Hispanic population.

As the region grows over the next 30 years, some basic demographic characteristics of the population will change. As a group, we will become both older and more ethnically diverse. The increase in diversity is the result of the various ethnic groups growing at different rates. While the region as a whole is expected to grow by about 38 percent by 2030, the Hispanic and the Asian/Other groups will each almost double in size during that time period. The Black population will grow by 30 percent, slightly below the regional rate. In contrast, the non-Hispanic White population will increase by only three percent. This pattern is similar to what we have been seeing for the last couple of decades.

Figure 3.2 shows that by 2030 the Hispanic proportion of the region's population will rise from today's 27 percent to 39 percent. The Asian/Other group will increase to 15 percent of the total population from its current 11 percent. The Black population will stay relatively constant at about five percent or six percent. The biggest change will be seen in the non-Hispanic White group, whose portion of the total population will drop from today's 56 percent down to 41 percent. When their share falls below 50 percent — probably around 2012 — there will be no ethnic majority in the region. Statewide, that is true today. The 2000 Census found that just 47 percent of Californians are non-Hispanic Whites.

In addition to ethnic changes, our region also is aging. Almost 30 percent of the region's population is baby boomers, the huge group of people born between 1946 and 1964. Their presence will help to raise the median age in the region from today's 32.4 years old to 36 years old in 2030 — an increase of 14 percent. By 2030, the number of people age 65 and older will increase by 134 percent. Fully 19 percent of the region's population will be in that age group then, which is a higher percentage than is seen today in the state of Florida.

FIGURE 3.2—THE REGION'S CHANGING ETHNIC COMPOSITION

SOURCE: SANDAG   ■ 2000 ■ 2030
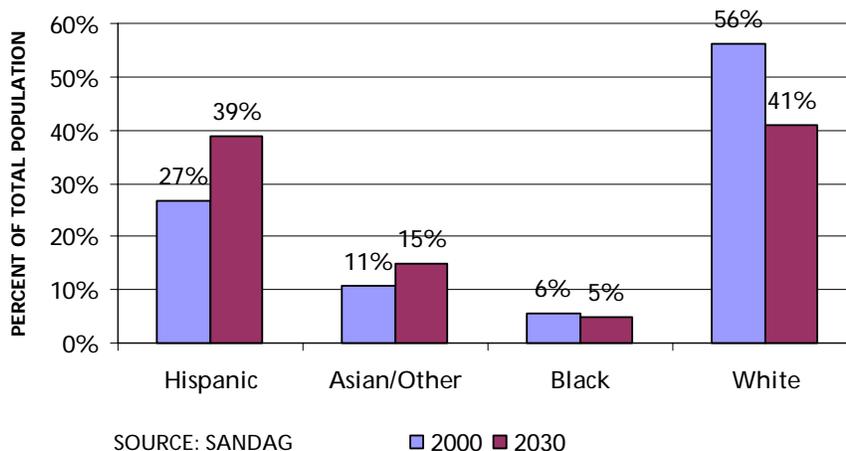
EMPLOYMENT & HOUSING

Job growth is directly linked to population growth. When there is an abundance of jobs in a region, domestic in-migration increases as people move to take advantage of the economic opportunities. SANDAG's 2030 Regional Growth Forecast predicts that the region will add just over 500,000 new jobs by 2030. More than half of those jobs — about 62 percent — will be created during the first 15 years of the forecast period.

Jobs will be created across all industry sectors. However, the largest gains will be seen in the relatively low paying Services sector, which is expected to grow by almost 60 percent. We are already beginning to see the impacts of the disparity between local wages and housing costs. More and more people are choosing to keep their jobs within the region, but move to more affordable homes in Riverside County and northern Baja California, Mexico.

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This interregional commuting will continue to increase, and is reflected in the 2030 Regional Growth Forecast. Over the 30-year period, it is estimated that 47,300 more households will have residents living in Riverside or Baja California while working within the San Diego region. Long distance commuting, both interregional and from within the region, has a tremendous impact on our transportation facilities.

However, increases in interregional commuting will have some dampening effect on local housing demand. Providing homes for an additional one million people over the next 30 years will still require at least 340,000 new housing units within the region. We are running out of large, environmentally acceptable land parcels that are planned for residential use.

Of the 340,000 units the region will build over 30 years, it is expected that more than half will be some sort of multifamily configuration, including stacked flats, attached town homes, and mixed-use projects.

The 2030 Forecast reflects the emphasis on smart growth as the region's future. This is discussed in more detail in Chapter 5. Smart growth is characterized by a more compact, environmentally sensitive pattern of development that seeks to contain urban sprawl and place more housing near job centers, thereby reducing long commutes.

Currently, about 63 percent of the region's housing stock consists of single family units, and about 33 percent are multifamily. (The remaining four percent are mostly mobile homes.) The combination of a scarcity of vacant, developable single family land and increasing congestion on our roads and highways will lead to a shift in housing characteristics. Of the 340,000 units the region will build over 30 years, it is expected that more than half will be some sort of multifamily configuration, including stacked flats, attached town homes, and mixed-use projects. This shift in housing type reflects the region's emphasis on smart growth, providing better housing availability, and an expected shift in housing preferences as the region's population ages. Much of this development will occur as redevelopment of older areas.

FIGURE 3.3—COMMUTING TO WORK –
1990 VS. 2000 CENSUS
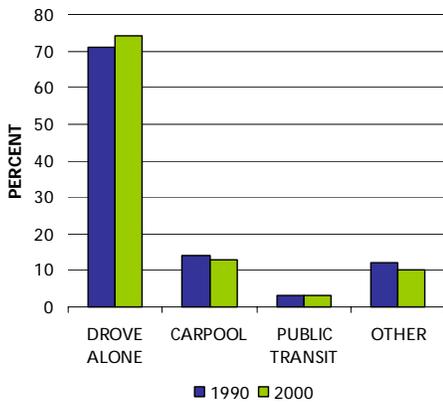
SOURCE: U.S. CENSUS

TRAVEL PATTERNS

Travel behavior is influenced by many factors, including demographics, land uses, our lifestyles, the economy, employment locations, and work practices. An understanding of patterns of travel has helped shaped MOBILITY 2030.

Like most major metropolitan areas around the country, the San Diego region has seen a gradual decline in commuting by carpool and transit in favor of driving alone. Between 1990 and 2000, the percentage of residents who drove alone to work increased, while commuting by all other modes decreased or stayed the same (see Figure 3.3). In part, this shift to solo commuting reflects the increase in two-worker households – which in turn, has increased the need for car trips – and the convenience and flexibility of the personal automobile.

Throughout the 1980s, travel (as measured in vehicle miles traveled or VMT) grew about twice as fast as population, primarily because of growth in two-worker households and longer commute distances. During the 1990s, growth in vehicle miles traveled was 50 percent higher than population growth.

The region faces a large increase in the demand for trip making over time. In 1990, daily travel demand was nine million trips. The region's current population makes an estimated 13.5 million daily trips by some form of motorized travel today. Travel demand is projected to increase to 16 million daily trips by 2030.

Figure 3.4 below compares the percentage change since 1980 in travel (measured in VMT), population, and employment. Growth in travel consistently has outpaced growth in population and employment over the past two decades. This trend is projected to continue through 2030. Projected 2030 vehicle miles traveled are four times higher than 1980 levels. Forecasted population and employment increase by 108 percent and 161 percent, respectively, over the same period.

FIGURE 3.4—GROWTH IN TRAVEL, POPULATION, AND EMPLOYMENT
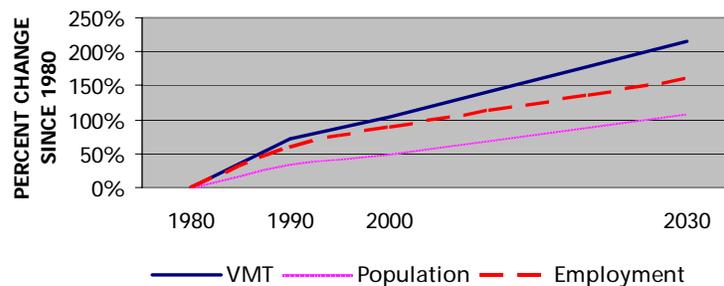
SOURCE: SANDAG

Many of the region's major facilities are operating at or beyond their capacity – the result of dramatic increases in motorized travel and limited financial capacity to keep pace with demand. Traffic congestion in urban areas like the San Diego region will generally worsen over time, unless we take actions to directly address travel demand and have options to get people out of their single occupant vehicle, especially during peak travel periods.

Of all trips taken by all transportation modes, the average trip length is five miles. Work travel, as measured in vehicle miles, comprises 27 percent of all highway travel, while non-work travel makes up 73 percent of travel on our highways. Work trips tend to be longer than non-work trips; today's average work trip length is 10.5 miles compared to 4.5 miles for the non-work trip.

Figure 3.5 shows average daily trips by hour of the day and trip purpose. Work trips make up the largest portion of travel demand during the morning and afternoon peak periods, although there are large shares of other trips (e.g., shopping, recreation, etc.), particularly in the afternoon hours. Morning trips tend to be commute trips, going directly from home to work. Evening trips involve a greater variety of origins and destinations, causing the evening peak period to spread out over a longer period of time. School trips constitute the smallest shares throughout the day.

It is the peaking of travel demand during short periods of the day that strains the regional transportation system, which has excess capacity during off-peak periods. Despite increases in travel demand, traffic congestion in the San Diego region is not as severe as other areas around the country. Based on Census 2000, the San Diego metropolitan area ranks 22nd in population and 28th in average travel time. The average commute time in the region grew by only three minutes between 1990 and 2000, indicating that people make personal adjustments to keep commute times reasonable.

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FIGURE 3.5—AVERAGE DAILY TRIPS BY HOUR AND TRIP PURPOSE

THOUSANDS

SOURCE: SANDAG

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