

## **TECHNICAL APPENDIX 2 REGIONAL POPULATION GROWTH FORECASTS**

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### **Introduction**

Since 1972, 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, the Preliminary 2030 Cities/County Forecast is the basis for the 2030 Regional Transportation Plan (RTP). SANDAG will produce a Final 2030 Cities/County Forecast by early Fall 2003. The RTP is regularly updated using the most current forecast data available.

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 and verified computer models. They are meant to help policy and decision-makers prepare for the future and are not an expression for or against growth. SANDAG's 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 staffs.

### **Discussion**

The forecast process includes two iterative phases. First, a forecast for the entire region is produced, based largely on economic trends and the associated demographic characteristics. As discussed below, the regional forecast also is affected by the amount of interregional commuting that occurs. The second phase allocates the regional forecast to jurisdictions and smaller geographic areas based on the region's general and community plans, and the amount and location of identified smart growth focus areas. The forecast allocation is influenced by land use and transportation policy decisions. Actions taken by one jurisdiction can affect not only that jurisdiction's forecast but potentially others as well.

The Preliminary 2030 Cities/County Forecast differs from the 2020 forecast produced in 1999 (used in the 2020 RTP), and from all previous forecasts. First, the 2000 Census revealed the region's population to be about 100,000 persons lower than the California Department of Finance had estimated. Second, new data indicate that Hispanic fertility rates dropped dramatically during the 1990s. These facts resulted in a regional population forecast for 2030 of about the same magnitude that was previously predicted for 2020: about 3.9 million people.

Another important issue incorporated into the 2030 Forecast is the inclusion of assumptions regarding the increasing amounts of interregional commuting. To account for and estimate the future levels of this type of commuting, SANDAG utilizes a model in conjunction with the allocation phase of the forecast process. To support the region's anticipated job growth, an additional 47,300 housing units will be needed by 2030 for workers living outside the region's boundary.

For the year 2020, the new 2030 Forecast projects a total of 250,000 fewer people in the region than did the old 2020 Forecast. Of that 250,000, 100,000 (40 percent) is the result of the lower Census, another 100,000 is due to the lower fertility rates, and 50,000 (20 percent) is attributable to interregional commuting.

Finally, the Preliminary 2030 Cities/County Forecast differs from previous forecasts in how it deals with smart growth. The 2020 Forecast, used for the 2020 RTP, added mixed use and higher density development around some 150 transit focus areas (TFAs) that were originally identified in the 1996 edition of the 2020 RTP. The 2030 Forecast replaces the TFAs with smart growth focus areas that were identified during consultations with the local jurisdictions.

As part of our normal forecasting process and in conjunction with the development of the Regional Comprehensive Plan, we will prepare a Final 2030 Cities/County Forecast scheduled for release in Fall 2003. This revision will incorporate comments we receive about the forecast as well as any new or updated information that becomes available.

Two factors, the lower than expected population figures from the 2000 Census, and the sharply lower fertility rates, account for 80 percent of why the region will grow at a slower pace than the previous forecast had predicted. However, it is important to emphasize that the one million more people are still coming, and the region still needs to plan accordingly.

Compared to those factors, the rise of interregional commuting has a relatively minor impact in terms of numbers, but is very significant with respect to future policy decisions. The 19 local jurisdictions, through their local land use authority, have the power to provide more and better housing opportunities for the region's residents.

As we plan for the future, the forecasts provide a tool that can aid in the formulation of local and regional policies as well as help to assess the results of implementing those policies. Quality of life can be improved and tedious long distance commutes avoided simply by making smarter planning choices. This is integral to both the vision and the challenge of the Regional Comprehensive Plan.

Finally, it is important to note that although the region's rate of growth has slowed considerably compared to that of the late 1980s, since the end of the recession we have been growing about twice as fast as the nation. That gap will gradually narrow until sometime in the 2020s, when our growth rate is expected to fall below the national figure.

The Preliminary 2030 Cities/County Forecast was accepted by the SANDAG Board of Directors in October 2002 for distribution, review, and use in planning and other studies. The final forecast will be prepared in Fall 2003. This forecast may exceed the development potential of current general and community plans, because it incorporates higher intensity and more mixed use development opportunities within smart growth areas identified by local agency staff.

The following tables (TA 2.1 through TA 2.4) present base year and forecasted population, housing, and employment data for the 19 local jurisdictions.

**TABLE TA 2.1—2030 CITIES/COUNTY FORECAST TOTAL POPULATION  
BY JURISDICTION AND SPHERE OF INFLUENCE**

	<b>2000</b>	<b>2010</b>	<b>2020</b>	<b>2030</b>	<b>NUMBER</b>	<b>PERCENTAGE CHANGE (2000-2030)</b>
<i>Jurisdictions</i>						
Carlsbad	78,247	105,033	120,057	124,922	46,675	60%
Chula Vista	173,556	244,332	269,529	282,664	109,108	63%
Coronado	24,100	25,399	25,544	25,536	1,436	6%
Del Mar	4,389	4,751	4,855	5,103	714	16%
El Cajon	94,869	98,670	107,219	109,044	14,175	15%
Encinitas	58,014	65,232	72,955	78,762	20,748	36%
Escondido	133,559	144,644	159,560	166,119	32,560	24%
Imperial Beach	26,992	27,825	29,723	31,866	4,874	18%
La Mesa	54,749	57,337	59,650	60,932	6,183	11%
Lemon Grove	24,918	26,956	29,049	30,008	5,090	20%
National City	54,260	56,622	61,854	67,430	13,170	24%
Oceanside	161,029	183,714	208,846	214,696	53,667	33%
Poway	48,044	52,643	55,442	55,932	7,888	16%
San Diego	1,223,400	1,387,658	1,507,242	1,613,355	389,955	32%
San Marcos	54,977	74,979	87,960	106,772	51,795	94%
Santee	52,975	58,584	67,703	69,221	16,246	31%
Solana Beach	12,979	13,406	13,726	14,411	1,432	11%
Vista	89,857	99,654	109,541	113,969	24,112	27%
Unincorporated	442,919	508,236	608,416	718,862	275,943	62%
<b>Region</b>	<b>2,813,833</b>	<b>3,235,675</b>	<b>3,598,871</b>	<b>3,889,604</b>	<b>1,075,771</b>	<b>38%</b>
<i>Spheres of Influence</i>						
Chula Vista	186,489	262,228	287,810	301,112	114,623	61%
El Cajon	112,047	117,161	128,932	131,082	19,035	17%
Encinitas	58,041	65,254	73,004	78,984	20,943	36%
Escondido	150,879	165,517	193,205	208,850	57,971	38%
National City	56,251	58,720	65,406	70,972	14,721	26%
Poway	48,148	52,742	55,570	56,066	7,918	16%
San Marcos	60,166	80,759	94,074	113,066	52,900	88%
Vista	102,934	114,977	132,394	145,579	42,645	41%

SOURCE: SANDAG Preliminary 2030 Cities/County Forecast

**TABLE TA 2.2—COMPARISON OF YEAR 2030 POPULATION  
CURRENT PLANS FORECAST VS. PRELIMINARY 2030 CITIES/COUNTY FORECAST**

	2000 CENSUS	2030 CURRENT PLANS <sup>1</sup>	PRELIMINARY 2030 CITIES/COUNTY FORECAST <sup>2</sup>	INCREASE FROM CURRENT PLANS	
				NUMBER	PERCENTAGE
Carlsbad	78,247	123,671	124,922	1,251	1.0%
Chula Vista	173,556	278,276	282,664	4,388	1.6%
Coronado	24,100	25,203	25,536	333	1.3%
Del Mar	4,389	4,710	5,103	393	8.3%
El Cajon	94,869	105,247	109,044	3,797	3.6%
Encinitas	58,014	70,088	78,762	8,674	12.4%
Escondido	133,559	161,463	166,119	4,656	2.9%
Imperial Beach	26,992	30,992	31,866	874	2.8%
La Mesa	54,749	60,511	60,932	421	0.7%
Lemon Grove	24,918	29,305	30,008	703	2.4%
National City	54,260	62,224	67,430	5,206	8.4%
Oceanside	161,029	200,408	214,696	14,288	7.1%
Poway	48,044	54,656	55,932	1,276	2.3%
San Diego	1,223,400	1,576,592	1,613,355	36,763	2.3%
San Marcos	54,977	83,537	106,772	23,235	27.8%
Santee	52,975	67,040	69,221	2,181	3.3%
Solana Beach	12,979	13,829	14,411	582	4.2%
Vista	89,857	111,525	113,969	2,444	2.2%
Unincorporated	442,919	835,732	718,862	-116,870	-14.0%
<b>REGION</b>	<b>2,813,833</b>	<b>3,895,009</b>	<b>3,889,604</b>	<b>-5,405</b>	<b>-0.1%</b>

<sup>1</sup> Current plans and policies with no smart growth areas added.

<sup>2</sup> Current plans plus smart growth focus areas and County population targets.

SOURCE: SANDAG Preliminary 2030 Cities/County Forecast

**TABLE TA 2.3—TOTAL HOUSING UNITS**

	2000	2030	2000 to 2030	
			NUMBER	PERCENTAGE
Carlsbad	33,798	50,990	17,192	51%
Chula Vista	59,495	90,666	31,171	52%
Coronado	9,494	9,819	325	3%
Del Mar	2,557	2,615	58	2%
El Cajon	35,190	38,188	2,998	9%
Encinitas	23,843	30,786	6,943	29%
Escondido	45,050	53,282	8,232	18%
Imperial Beach	9,739	10,832	1,093	11%
La Mesa	24,943	25,988	1,045	4%
Lemon Grove	8,722	10,025	1,303	15%
National City	15,422	18,569	3,147	20%
Oceanside	59,581	74,867	15,286	26%
Poway	15,714	17,425	1,711	11%
San Diego	469,689	602,529	132,840	28%
San Marcos	18,862	36,237	17,375	92%
Santee	18,833	23,272	4,439	24%
Solana Beach	6,456	6,634	178	3%
Vista	29,814	35,903	6,089	20%
Unincorporated	152,947	241,017	88,070	58%
<b>REGION</b>	<b>1,040,149</b>	<b>1,379,644</b>	<b>339,495</b>	<b>33%</b>

SOURCE: SANDAG Preliminary 2030 Cities/County forecast

**TABLE TA 2.4—TOTAL EMPLOYMENT**

	2000	2030	2000 to 2030	
			NUMBER	PERCENTAGE
Carlsbad	50,780	81,126	30,346	60%
Chula Vista	53,750	98,989	45,239	84%
Coronado	29,913	30,349	436	1%
Del Mar	3,830	4,215	385	10%
El Cajon	41,333	48,224	6,891	17%
Encinitas	24,240	28,220	3,980	16%
Escondido	49,678	64,974	15,296	31%
Imperial Beach	3,886	4,560	674	17%
La Mesa	25,385	27,936	2,551	10%
Lemon Grove	8,575	9,793	1,218	14%
National City	24,763	29,404	4,641	19%
Oceanside	39,610	74,817	35,207	89%
Poway	21,776	34,605	12,829	59%
San Diego	777,679	984,872	207,193	27%
San Marcos	30,453	53,278	22,825	75%
Santee	16,088	27,924	11,836	74%
Solana Beach	8,870	9,812	942	11%
Vista	33,820	51,462	17,642	52%
Unincorporated	140,244	218,835	78,591	56%
<b>REGION</b>	<b>1,384,673</b>	<b>1,883,395</b>	<b>498,722</b>	<b>36%</b>

SOURCE: SANDAG Preliminary 2030 Cities/County forecast