Why do we need a Regional Comprehensive Plan? Let’s examine the facts. It helps to look at some objective statistical information that puts our past, present, and future into perspective. This chapter provides data that gives us a picture of where we’ve come from, where we are today, and where we are headed under our current plans and policies. It provides insight into what’s working, what isn’t, and what we can do to change our future for the better.

CURRENT CONDITIONS

At the beginning of 2004, the San Diego region had a total population of just over three million people, an increase of more than 200,000 people (7.2 percent) over the 2000 Census. The total number of housing units rose just 4.9 percent during the same period. This imbalance in the growth rates of population and housing units accounted for a slight increase in the number of persons per household.

People and Housing Facts

The 2000 Census painted an interesting picture of the region:

- Our median age is 33.2 years – about 10 percent younger than the nation as a whole.
- Twenty-six percent of our residents are under the age of 18; 11 percent are 65 and older.
- We are ethnically diverse: Just over half of us are non-Hispanic White.
- Thirty-three percent of residents over the age of five speak a language other than English at home.
- We are educated: 65 percent of residents age 25 or older have at least some college education, and 30 percent have a bachelor’s degree or higher.
- Eighteen percent of people age five and over have a disability.
- Median annual household income is over $47,000, compared to the national figure of $42,000; however, 13 percent of our residents live in poverty.
- Our housing stock is relatively new: 62 percent of the region’s homes were built after 1970.
- Our housing stock is 60 percent single family, 35 percent multifamily, and five percent mobile homes.
- Fifty-five percent of households are owner-occupied, 45 percent are renter-occupied.
- The number of people commuting into the region from Riverside County tripled between 1990 and 2000.
**Land Facts**

In addition to Census data, SANDAG maintains a wealth of land use information on the region. Here are a few highlights:

- The region comprises over 2.7 million acres of land (more than 4,200 square miles) – almost the size of the state of Connecticut.
- About 55 percent of our total land area is not available for public development, including public lands, dedicated parks and open space, and land constrained for environmental reasons. Another five percent is dedicated to military use.
- So far, more than 190,000 acres have been identified as habitat set-aside. Over time, this figure could double.
- There are more than 8,500 miles of roads in the region, which cover more than 85,000 acres of land.
- There are 18 Indian reservations in the region; more than any other county in the nation, totaling almost 130,000 acres.
- More than 90 percent of our remaining vacant land designated for residential development is planned for densities of less than one home per acre, and most is in the rural back country areas dependent upon scarce ground water supplies.

**FUTURE TRENDS**

The San Diego region will continue to grow over the next 30 years, but at a slower pace than in previous decades. SANDAG’s 2030 Final Forecast projects that between 2000 and 2030 the region will add about one million more people, over 300,000 new homes,¹ and more than 400,000 new jobs.

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¹ The 314,000 new homes projected in the forecast will consume almost all of the remaining housing unit capacity of the region under current local land use plans. Capacity estimates for the 18 cities are a joint effort of SANDAG and the local planning staffs. Together, the staffs review detailed, large-scale maps of existing land use, planned land use, and potential areas of redevelopment (change of use) or infill development (intensification of the existing use). The planners indicate where within each planned density range development typically occurs, which often differs between vacant land and redeveloped land. Edits are made to SANDAG’s GIS databases, and a new map and capacity estimate are produced. This process is reiterated with each city until they are satisfied that the estimate is reasonable and realistic. For the unincorporated area, SANDAG used the GP2020 population targets (in effect, a predetermined capacity), and the December 2002 Working Copy land use map for distribution. A more detailed explanation of this process is provided in the document *Final 2030 Forecast Process and Model Documentation*, available on the SANDAG Web site (www.sandag.org).
TABLE 3.1—REGIONAL GROWTH, 1970-2030

<table>
<thead>
<tr>
<th></th>
<th>1970 CENSUS</th>
<th>2000 CENSUS</th>
<th>2030 FORECAST</th>
<th>NUM. INCREASE</th>
<th>PCT. INCREASE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEOPLE</td>
<td>1,357,900</td>
<td>2,813,800</td>
<td>3,855,100</td>
<td>1,455,900</td>
<td>107%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,041,300</td>
<td>37%</td>
</tr>
<tr>
<td>HOMES</td>
<td>450,800</td>
<td>1,040,100</td>
<td>1,354,100</td>
<td>589,300</td>
<td>131%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>314,000</td>
<td>30%</td>
</tr>
<tr>
<td>JOBS¹</td>
<td>566,900</td>
<td>1,384,700</td>
<td>1,824,000</td>
<td>817,800</td>
<td>144%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>439,300</td>
<td>32%</td>
</tr>
</tbody>
</table>

¹ Includes uniformed military.

Sources: US Census Bureau, SANDAG

In each category, substantially less growth is projected than what we experienced between 1970 and 2000. This forecast is based on economic and demographic factors that are influenced by the currently adopted land use plans and policies of the 18 cities, and the most recent information from the County of San Diego’s general plan update (GP2020) for the unincorporated area. It also assumes that current trends related to high housing costs, low vacancy rates, increasing household sizes, and increasing interregional commuting will continue. No assumptions were made regarding how the general and community plans might change or evolve over time in response to the growth. In short, our population is expected to grow more slowly than in the past and more slowly when compared to our neighboring regions. And unlike the 1970 to 2000 period, the majority of the newcomers will be our residents’ children and grandchildren, rather than people who move to the region from other parts of the nation or the world.

MEETING OUR REGIONAL HOUSING NEEDS

When taken together, the current plans do not accommodate the amount of growth anticipated in our region. Even taking into account areas with the potential for infill residential redevelopment, more land for homes and apartments needs to be designated in the plans. The 2030 Final Forecast, which reflects the current adopted local land use plans in the region, projects that while population will increase by 37 percent over the forecast period, housing will grow by just 30 percent. The forecast shows that if local plans are not changed, demand for housing will continue to outpace the supply, just as it does today.

This imbalance will result in the worsening of four trends we see in the region today: high housing costs, low vacancy rates, more persons per household (“doubling up”), and an increase in long-distance interregional commuting by the region’s employees who seek less expensive housing in Riverside County, Baja California, and even Imperial County. Census data from 1990 and 2000 indicate that the number of people commuting from Riverside County almost tripled in the last decade. And a more recent survey found the flow of interregional commuters to be increasing steadily.

Is the answer to institute policies that intentionally slow growth? In 2001, SANDAG produced a study entitled An Analysis of Growth Slowing Policies for the San Diego Region. Its purpose was to look at the potential impacts of public policies designed to slow population growth in the region. One of the scenarios tested was a housing-cap policy that would reduce the supply of new housing by 40 percent from the amount projected to be built between 2000 and 2020. Rather than a
corresponding 40 percent reduction in future population, the scenario projected the region would see only an eight percent drop by 2020. Most people would simply adapt to the situation, primarily through larger households (more persons per household) and more interregional commuting.

The same type of outcome resulted when we simulated reducing future job growth by 40 percent. People and businesses adapted, and the effect on population growth was minimal. However, in both cases, the impacts on social equity were decidedly negative. The less affluent bear a disproportionate share of the pain that results from inadequate job and housing opportunities.

Remember, the 2030 Final Forecast is not a prescription for the future. It simply portrays the likely outcomes if we continue operating under our current plans and policies.

POPULATION TRENDS

During the late 1980s, the San Diego region was adding as many as 90,000 persons per year — an annual growth rate of three percent. Since the recession ended in the mid-1990s, population growth in the region has averaged about 50,000 annually. That’s equivalent to adding a city the size of Poway each year.

Our growth rate, however, is slowing and that trend will continue. By the mid-2020s, our growth rate will fall below the national rate of about one percent. The primary drivers of this trend are declining fertility rates and the aging and eventual dying of the disproportionately large baby boom generation. Currently, Riverside County, Imperial County, and Tijuana are all growing faster than we are, as illustrated in Figure 3.1.

FIGURE 3.1—SOUTHERN CALIFORNIA/ NORTHERN BAJA CALIFORNIA ANNUAL AVERAGE GROWTH RATES, 1990-2000

Sources: US Census Bureau, IMPLAN, City of Tecate
The population grows two ways: natural increase (births minus deaths), and net migration (people who move here minus those who move away).

Migration can be domestic or foreign. The federal government controls legal foreign immigration, which has remained fairly constant over the past decade. It accounts for about one-third of our growth in a typical year, and we expect no major change in immigration levels in the foreseeable future. It is important to note that while illegal immigration is presumed to be prevalent in this region, its true magnitude is simply unknown. Estimates of the number of undocumented migrants residing here vary widely, due to a lack of hard data. Therefore, no attempt is made to specifically forecast their future numbers.

Historically, domestic migration (people moving to and from other parts of the state or the nation) has fluctuated each year, usually based on the condition of the local economy. However, about two-thirds of our growth between now and 2030 will be the result of natural increase. Note that natural increase includes children born here to people who themselves were born here, as well as children born here to people who moved here 10 years ago, and those born here to people who will move here 10 years from now.

Figure 3.2 compares the region’s historic and future growth rates to those of the nation.²

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2 The historical rates in this figure fluctuate more than the forecasted rates because they reflect what actually happened in the past, including any extraordinary circumstances such as the unusually serious recession of the early 1990s. Forecasts do not predict such extremes, unless there is reason to. SANDAG’s forecasts reflect a more normal business cycle, and by definition do not include unforeseen or unexpected events.
The main reason our growth rate is slowing is a 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 among Hispanics. In fact, the Hispanic fertility rate today is as low as what the 2020 Regional Growth Forecast had projected for the year 2020.

DEMOGRAPHIC TRENDS

As the region grows, some basic demographic characteristics of the population will change. As a group, we will become both older and more ethnically diverse. The region as a whole is expected to grow by 37 percent by 2030 and some ethnic groups will almost double in size during that period.

Figure 3.3 shows the forecasted changes by ethnic group between 2000 and 2030. At some point, perhaps 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 composed of Baby Boomers, the huge group of people born between 1946 and 1964. Their presence will increase the median age in the region from today’s 33.2 years to 37 years in 2030. By 2030, the number of people age 65 and older will have increased by 128 percent. Fully 19 percent of the region’s population will be in that age group then, which is a higher percentage than exists today in the state of Florida.
TABLE 3.2—2000 to 2030 POPULATION INCREASE
BY AGE RANGES

<table>
<thead>
<tr>
<th>AGE RANGE</th>
<th>INCREASE</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 – 17</td>
<td>13%</td>
</tr>
<tr>
<td>18 – 65</td>
<td>29%</td>
</tr>
<tr>
<td>65+</td>
<td>128%</td>
</tr>
</tbody>
</table>

Source: SANDAG 2030 Final Forecast

HOUSING TRENDS

As a region, we tend to live in detached houses rather than apartments or condominiums. Currently, about 60 percent of the region’s housing stock is single family units, and about 35 percent is multifamily (the rest are mostly mobile homes). The scarcity of vacant, useable single family land, combined with increasing congestion on our roads and highways, will lead to a shift in housing characteristics in the future. Projections suggest that more than half of the 314,000 units expected to be built in the region by 2030 will be multifamily, including low-rise, high-rise, attached town homes, and mixed-use projects. Even with this trend, multifamily homes will still comprise less than 40 percent of the region’s housing units in 2030.

FIGURE 3.4—THE PROPORTION OF MULTIFAMILY
UNITS WILL INCREASE OVER TIME

If we continue to build homes at a slower pace than we add people, interregional commuting will increase. Over the 30-year period, it is estimated that more than 90,000 households would, in effect, be “exported” to Riverside County, Baja California, or even Imperial County unless there are significant changes to today’s land use plans. Long-distance commuting, both interregional and from within the region, puts a tremendous strain on our roads, freeways, infrastructure, and personal lives.
CONCLUSION

Population growth in the region will continue over the next 30 years, but at a much slower pace than the previous three decades. About two-thirds of our growth will be the result of natural increase: children born to people living here at the time. Our population as a whole will become both more ethnically diverse and older.

The 2030 Final Forecast portrays the likely outcomes if we continue operating under our current plans and policies. Housing will remain expensive, vacancy rates will remain low, household sizes will increase, and there will be more long distance interregional commuting. As a region, we can choose another path— one that provides more housing located close to jobs for our region’s expected population growth and lessens the associated transportation impacts. The Regional Comprehensive Plan provides a compass that can guide us toward this better future. It provides a framework to manage our expected population growth in a way that preserves and enhances our quality of life by promoting more and better-connected housing, transportation, and employment choices for our increasingly-diverse and aging population.