Technical Appendix 2

# 2050 Regional Growth Forecast

## Appendix Contents

# 2050 Regional Transportation Plan

## 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, the 2050 Regional Growth Forecast Update is the basis for the 2050 Regional Transportation Plan (RTP).

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. 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 staffs.

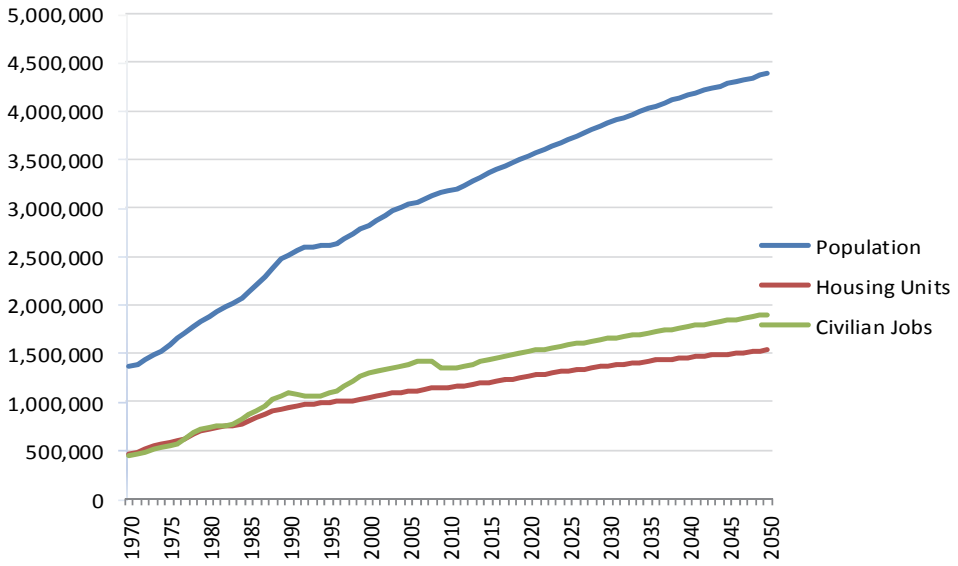
## Discussion

Between 2008 and 2050, the San Diego region is expected to grow by 1.25 million residents and 500,000 jobs. That population and job growth is expected to result in 388,000 additional housing units. (See Figure TA 2.1.) The number of new residents is higher than the number of new housing units because, on average, between 2 and 3 people live in each housing unit. In addition, the number of new residents is higher than the number of new jobs because many residents do not participate in the labor force (e.g., children and seniors).

## 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 regional forecast to jurisdictions and smaller geographic areas based on the region's general and community plans. The forecast allocation is influenced by land use and transportation policy decisions. Actions taken by one jurisdiction can affect not only

**Figure TA 2.1 – San Diego Regional Population, Jobs, and Housing Forecast**



that jurisdiction's forecast, but potentially others as well.

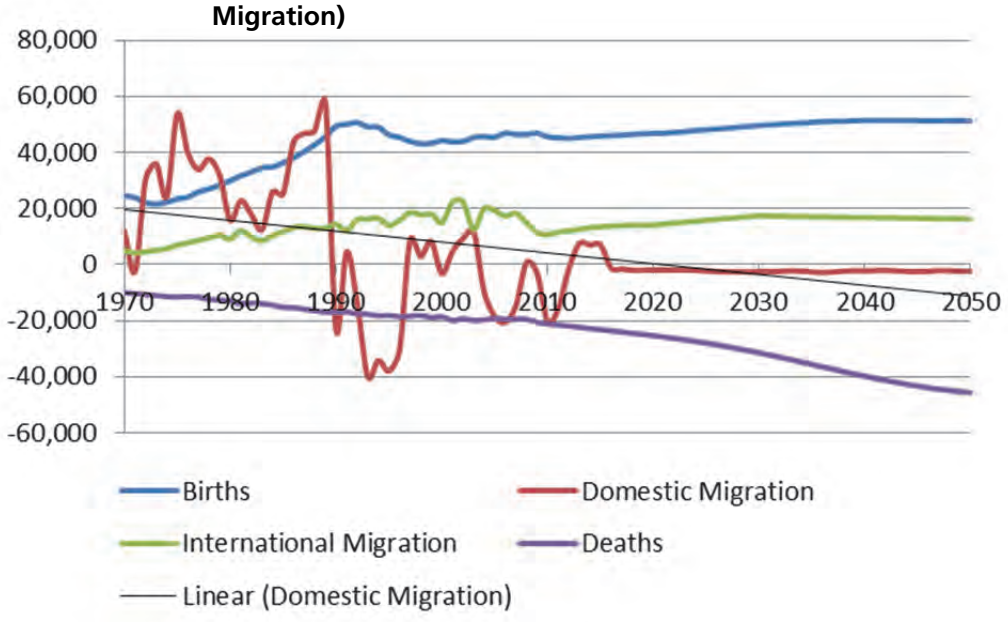
## Regionwide Projections

During the 42-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 approximate 1 percent per year, or an average of approximately 30,000 people per year, and 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-2040s. 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 occurring across most ethnic groups, and that the Hispanic population is experiencing the sharpest decline. In addition, the region's rate of domestic in-migration (residents moving into San Diego from other parts of the United States) has slowed substantially in the past 15 years, and this forecast does not project any change in that trend.

While San Diego has long been thought of as a region of "transplants" where more than half of residents were born outside of the State of California, future growth is expected to be largely homegrown. (See Figure TA 2.2.) 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.

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 TA 2.2 – Components of Population Change (Births, Deaths, and Migration)**



This forecast, like the prior two forecasts produced by SANDAG, makes use of an Interregional Commute Model (IRCM). The IRCM is used to project the number of households that have workers who commute into the San Diego region for work, but who choose to live outside the region in a neighboring community (e.g., Orange County, Riverside County, Imperial County, or Northern Baja California). Unlike prior forecasts, the level of interregional commuting in the 2050 Regional Growth Forecast is relatively small, only 15,000 households - less than 4 percent of the region's expected future household growth.

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, as well as help to assess the results of implementing those policies.

## Subregional Projections

SANDAG staff worked extensively with the region's 18 cities, the County of San Diego, and other land use agencies (e.g., the Department of Defense, tribal governments) to understand local land use plans and policies, as well as constraints to development. That detailed land use information is incorporated into the future development and redevelopment projections that comprise the 2050 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.

The results of this model are then reviewed by each jurisdiction's staff, and the final forecast may be adjusted based on local feedback to create the forecast that is used in the RTP.

The following tables (Table TA 2.1 through Table TA 2.3) present base year and forecasted population, housing, and employment data for the 19 local jurisdictions.

**Table TA 2.1 – 2050 Regional Growth Forecast Total Population by Jurisdiction**

| | | | | | Change (2008-2050) | |
|---|---|---|---|---|---|---|
| **Jurisdictions** | **2008** | **2020** | **2035** | **2050** | **Number** | **Percent** |
| Carlsbad | 103,406 | 117,667 | 125,338 | 129,352 | 25,946 | 25% |
| Chula Vista | 230,397 | 267,418 | 300,558 | 330,049 | 99,652 | 43% |
| Coronado | 23,030 | 26,370 | 27,236 | 27,907 | 4,877 | 21% |
| Del Mar | 4,561 | 4,800 | 4,978 | 5,151 | 590 | 13% |
| El Cajon | 97,555 | 109,587 | 138,796 | 144,229 | 46,674 | 48% |
| Encinitas | 63,615 | 68,551 | 74,268 | 76,675 | 13,060 | 21% |
| Escondido | 143,259 | 154,635 | 168,505 | 177,559 | 34,300 | 24% |
| Imperial Beach | 28,092 | 28,233 | 31,857 | 36,125 | 8,033 | 29% |
| La Mesa | 56,445 | 62,136 | 68,682 | 78,174 | 21,729 | 38% |
| Lemon Grove | 25,511 | 26,702 | 29,803 | 31,883 | 6,372 | 25% |
| National City | 56,144 | 62,058 | 73,973 | 92,137 | 35,993 | 64% |
| Oceanside | 178,102 | 195,592 | 212,366 | 217,108 | 39,006 | 22% |
| Poway | 50,744 | 54,054 | 58,466 | 59,756 | 9,012 | 18% |
| San Diego | 1,333,617 | 1,542,324 | 1,759,260 | 1,947,184 | 613,567 | 46% |
| San Marcos | 82,419 | 90,794 | 103,238 | 105,546 | 23,127 | 28% |
| Santee | 55,850 | 64,551 | 72,521 | 72,554 | 16,704 | 30% |
| Solana Beach | 13,447 | 14,134 | 15,249 | 15,969 | 2,522 | 19% |
| Vista | 95,400 | 99,985 | 116,448 | 144,592 | 49,192 | 52% |
| Unincorporated | 489,958 | 545,409 | 644,589 | 692,917 | 202,959 | 41% |
| **Region** | **3,131,552** | **3,535,000** | **4,026,131** | **4,384,867** | **1,253,315** | **40%** |

**Table TA 2.2 – 2050 Regional Growth Forecast Total Civilian Jobs by Jurisdiction**

| | | | | | Change (2008-2050) | |
|---|---|---|---|---|---|---|
| **Jurisdictions** | **2008** | **2020** | **2035** | **2050** | **Number** | **Percent** |
| Carlsbad | 61,999 | 70,228 | 80,949 | 87,109 | 25,110 | 41% |
| Chula Vista | 70,230 | 82,146 | 106,418 | 121,551 | 51,321 | 73% |
| Coronado | 8,166 | 8,265 | 8,398 | 8,423 | 257 | 3% |
| Del Mar | 4,065 | 4,149 | 4,528 | 5,028 | 963 | 24% |
| El Cajon | 41,686 | 44,463 | 51,861 | 58,630 | 16,944 | 41% |
| Encinitas | 26,985 | 28,711 | 30,746 | 31,481 | 4,496 | 17% |
| Escondido | 61,143 | 66,803 | 72,558 | 74,915 | 13,772 | 23% |
| Imperial Beach | 7,187 | 7,479 | 8,434 | 8,884 | 1,697 | 24% |
| La Mesa | 27,579 | 28,813 | 31,018 | 32,018 | 4,439 | 16% |
| Lemon Grove | 7,640 | 7,890 | 8,786 | 9,660 | 2,020 | 26% |
| National City | 21,060 | 21,994 | 26,985 | 29,985 | 8,925 | 42% |
| Oceanside | 43,977 | 48,464 | 57,810 | 67,550 | 23,573 | 54% |
| Poway | 31,176 | 32,386 | 37,190 | 40,955 | 9,779 | 31% |
| San Diego | 790,252 | 838,909 | 916,990 | 1,006,880 | 216,628 | 27% |
| San Marcos | 37,383 | 40,843 | 50,990 | 61,604 | 24,221 | 65% |
| Santee | 15,304 | 16,949 | 20,261 | 26,554 | 11,250 | 74% |
| Solana Beach | 7,533 | 7,823 | 8,564 | 8,780 | 1,247 | 17% |
| Vista | 41,315 | 44,693 | 53,891 | 61,293 | 19,978 | 48% |
| Unincorporated | 107,131 | 114,338 | 132,726 | 157,469 | 50,338 | 47% |
| **Region** | **1,411,811** | **1,515,346** | **1,709,103** | **1,898,769** | **486,958** | **34%** |

**Table TA 2.3 – 2050 Regional Growth Forecast Total Housing Units by Jurisdiction**

| | | | | | Change (2008-2050) | |
|---|---|---|---|---|---|---|
| **Jurisdictions** | **2008** | **2020** | **2035** | **2050** | **Number** | **Percent** |
| Carlsbad | 43,496 | 48,104 | 50,224 | 50,559 | 7,063 | 16% |
| Chula Vista | 77,484 | 88,186 | 98,262 | 106,999 | 29,515 | 38% |
| Coronado | 9,543 | 9,580 | 9,776 | 9,801 | 258 | 3% |
| Del Mar | 2,535 | 2,587 | 2,606 | 2,606 | 71 | 3% |
| El Cajon | 35,596 | 39,187 | 48,251 | 49,797 | 14,201 | 40% |
| Encinitas | 24,805 | 26,331 | 28,135 | 28,484 | 3,679 | 15% |
| Escondido | 47,412 | 50,370 | 53,164 | 54,596 | 7,184 | 15% |
| Imperial Beach | 9,851 | 9,866 | 10,856 | 12,148 | 2,297 | 23% |
| La Mesa | 25,019 | 26,785 | 28,985 | 32,566 | 7,547 | 30% |
| Lemon Grove | 8,820 | 9,076 | 9,811 | 10,423 | 1,603 | 18% |
| National City | 15,773 | 17,052 | 20,128 | 25,272 | 9,499 | 60% |
| Oceanside | 64,456 | 69,630 | 73,684 | 73,551 | 9,095 | 14% |
| Poway | 16,313 | 17,233 | 18,219 | 18,215 | 1,902 | 12% |
| San Diego | 508,436 | 577,416 | 654,750 | 722,718 | 214,282 | 42% |
| San Marcos | 27,556 | 30,065 | 33,444 | 33,521 | 5,965 | 22% |
| Santee | 19,538 | 22,312 | 24,494 | 24,451 | 4,913 | 25% |
| Solana Beach | 6,509 | 6,646 | 6,957 | 7,065 | 556 | 9% |
| Vista | 30,650 | 31,602 | 35,742 | 43,940 | 13,290 | 43% |
| Unincorporated | 166,862 | 180,460 | 210,032 | 222,378 | 55,516 | 33% |
| **Region** | **1,140,654** | **1,262,488** | **1,417,520** | **1,529,090** | **388,436** | **34%** |