

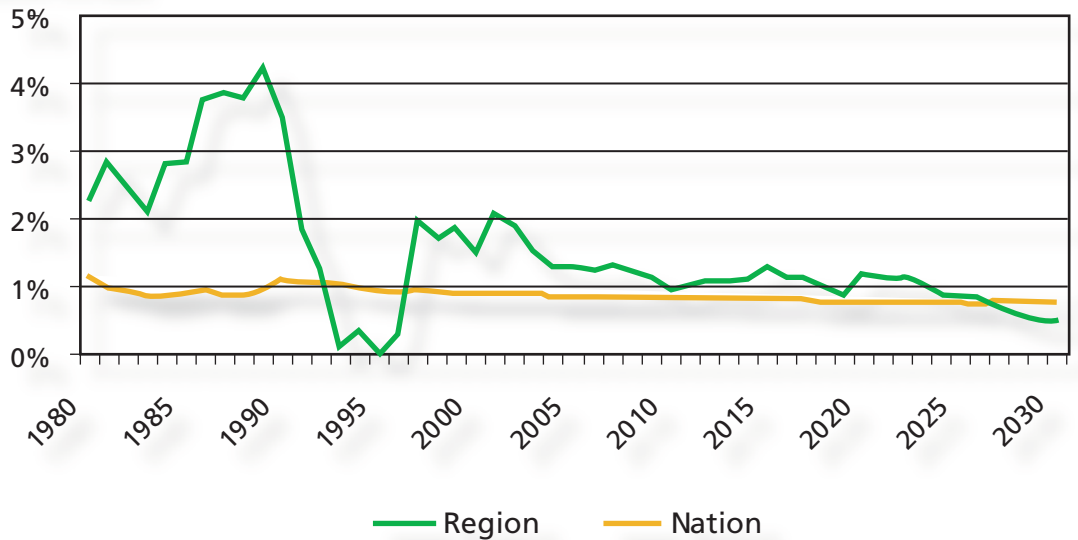
*info*

## 2030 Regional Growth Forecast

### Growth Rates are Slowing

San Diego Region and the Nation

Average Annual Population Increase



# table of contents

**Introduction** ..... 2

**The Region**..... 2

**Jurisdictions**..... 4

## Introduction

**S**ANDAG's Final 2030 Forecast was released in November 2003. It predicts that between 2000 and 2030 the San Diego region will add about one million more people, over 300,000 new homes, and more than 400,000 additional jobs. (See Table 1.) Although this is a significant amount of growth, the region's growth rate has actually slowed over the last decade, and that pattern will continue. In fact, by the mid-2020s, our growth rate is expected to fall below that of the nation as a whole. (See cover chart.)

For the 18 incorporated cities in the region, the forecast is based on the current adopted land use plans and policies as they stand today. For the unincorporated area, the forecast is based on the most recent version of the County's GP2020 plan update, as the Board of Supervisors feels that it more accurately reflects the County's

future direction. Hence, the 2030 Forecast provides a clear assessment of where our plans of today, if left unchanged, will likely take us over the coming decades. There are several long-range implications:

- The 314,000 new homes needed by 2030 is roughly equivalent to the entire remaining housing unit capacity of the region under today's general and community plans. Furthermore, almost one-quarter of that remaining capacity is in the form of redevelopment and residential infilling of land that is already developed. On land that is currently vacant, the remaining housing unit capacity of the region in 2000 was about 244,000 homes. Today, just four years later, the remaining capacity on currently vacant land is fewer than 200,000 homes.
- Over the next 15 to 20 years, most cities will fully develop under their current plans. Therefore, between 2020 and 2030, most of the growth in housing units (about 86 percent) occurs in just two areas: within the higher density central areas of the City of San Diego, and in the very low density unincorporated areas well outside of the cities.
- People will seek lower-cost housing elsewhere, but continue to work within the region, meaning that

interregional commuting will increase substantially. In this forecast, about 93,000 households are "exported" to Riverside County, Baja California, and even Imperial County over the 30 years. Currently, about three percent of our workforce lives outside of the region's boundaries. By 2030 that figure could increase significantly.

- Household size (the number of persons per household) rises by about five percent between 2000 and 2030, from 2.73 to 2.88. This seemingly small increase accounts for an additional 200,000 people living in the region's existing homes.

## The Region

**T**able 1 presents the regional change in population, housing units, employment, household size, and household income over the 30-year period 2000 to 2030. About one million new residents will be added to the region by 2030, with natural increase (births minus deaths) accounting for about two-thirds of the growth. The remaining one-third is the result of net migration, both domestic and international.

As is the case today, population growth is expected to continue to outpace home construction. Over time, this imbalance will result in an increase in household size (the number of persons per household), a decrease in vacancy rates, and an increase in the amount of interregional commuting, primarily from southwestern Riverside County and northern Baja California.

Although the region's population will grow by a million people over the forecast period, our rate of growth is slowing. The chart on the cover compares the region's growth rate to that of the nation over the 50-year period 1980 to 2030. While we

**SANDAG's Regional Information System** contains a comprehensive collection of historic, current, and forecasted information. We continuously update these datasets that contain demographic, economic, land use, transportation, criminal justice, and environmental information.

Much of this information can be obtained from our Web site ([www.sandag.org](http://www.sandag.org)). Formatted data reports and raw data can be extracted from the Profile Warehouse and the Data Warehouse. The site also provides access to several interactive mapping applications.

SourcePoint, a nonprofit corporation chartered by SANDAG, can provide assistance in preparing customized reports and maps.

For more information, contact our Public Information Office at (619) 699-1950.

## Ethnicity

Ethnicity is reported in four mutually exclusive groups—Hispanics and non-Hispanic Whites, non-Hispanic Blacks or African Americans, and non-Hispanic Asian and other races. This terminology is consistent with the way 2000 Census information was collected and reported.

### Hispanic

Includes all persons of Hispanic or of Latino or Spanish origin. Hispanics may be of any race.

**Non-Hispanics** are divided into three groups:

**White:** Includes persons who identified their race as White as well as persons who did not classify themselves in one of the specific race categories but entered a response suggesting European or Middle Eastern origin.

**Black:** Includes persons who identified their race as Black or African American as well as persons who did not classify themselves on one of the specific race categories, but entered a response such as African, Creole, Jamaican, or West Indian.

**Asian/Other:** Includes persons who identified their race as Japanese, Chinese, Filipino, Korean, Asian Indian, Vietnamese, Hawaiian, Guamanian, Samoan, Other Asian and Pacific Islander, American Indian, or another race category not included elsewhere.

**Table 1**  
Population, Housing and Employment  
San Diego Region

	2000	2010	2020	2030	2000 - 2030 Change	
					Num.	Pct.
Population	2,813,800	3,211,700	3,528,600	3,855,100	1,041,300	37%
Housing Units	1,040,100	1,166,100	1,254,600	1,354,100	314,000	30%
Employment	1,384,700	1,528,500	1,672,900	1,824,000	439,300	32%
Household Size	2.73	2.78	2.86	2.88	0.15	5%
Median Hhld. Income	\$47,500	\$48,700	55,900	\$64,600	17,100	36%

Source: 2030 Regional Growth, November 2003, SANDAG.

**Table 2**  
Population Change by Ethnic Group, 2000 – 2030  
San Diego Region

	2000	2030	2000 - 2030 Change	
			Num.	Pct.
Hispanic	751,000	1,423,500	672,500	90%
White	1,548,800	1,529,100	-19,700	-1%
Black	154,500	197,400	43,000	28%
Asian/Other	359,500	705,100	345,500	96%
Region	2,813,800	3,855,100	1,041,300	37%

Source: 2030 Regional Growth Forecast, November 2003, SANDAG.

will experience some ups and downs between now and 2030, the general trend is downward. By the mid-2020s, we will be growing at a slower pace than the nation. The reasons for this slowdown include the fact that land available for residential development will diminish. Also, the region's mortality rate will rise as those in the large baby boom generation reach their 70s and 80s toward the end of the forecast period.

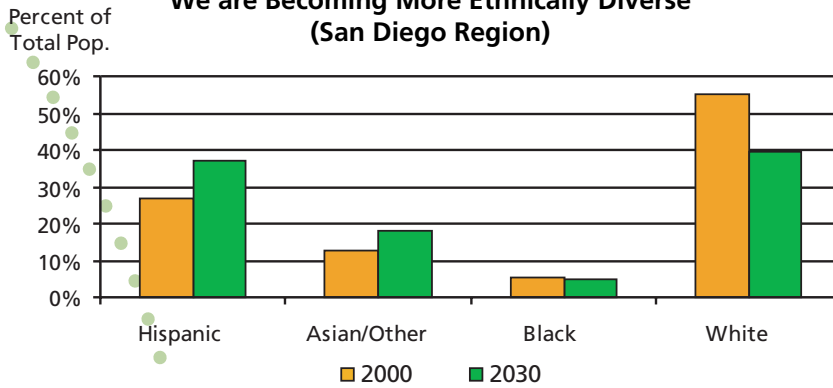
The region's median household income (adjusted for inflation, shown in constant (1999) dollars) is expected to show positive gains over the forecast period, from \$47,500 in 2000 to \$64,600 in 2030. This 36 percent increase in real median household income may seem large, but the figures are consistent with historical trends and projected long-term income growth trends for California and the nation.

Our ethnic composition will continue to evolve. Table 2 presents the regional changes in population for

four ethnic groups: Hispanic, and non-Hispanic White, Black, and Asian/Other. While the Hispanic and Asian/Other groups will almost double in size over the 30 years, the number of Whites is expected to decline slightly. Figure 1 illustrates these changes in terms of share of total population. The Hispanic and Asian/Other groups both gain as a percent of total population. The Black group stays constant at about five percent, and the White group's share drops from 55 percent today to 40 percent in 2030. When that group's share falls below 50 percent—probably around the year 2006—there will be no ethnic majority in the San Diego region. Statewide, that is true today. The 2000 Census found that only 47 percent of Californians classified themselves as non-Hispanic White.

Just as the ethnic composition of the region will change dramatically, so will its age structure. Table 3 clearly illustrates the aging of the region's population. During the 30-year forecast period, the region's median

**Figure 1**  
**We are Becoming More Ethnically Diverse**  
**(San Diego Region)**

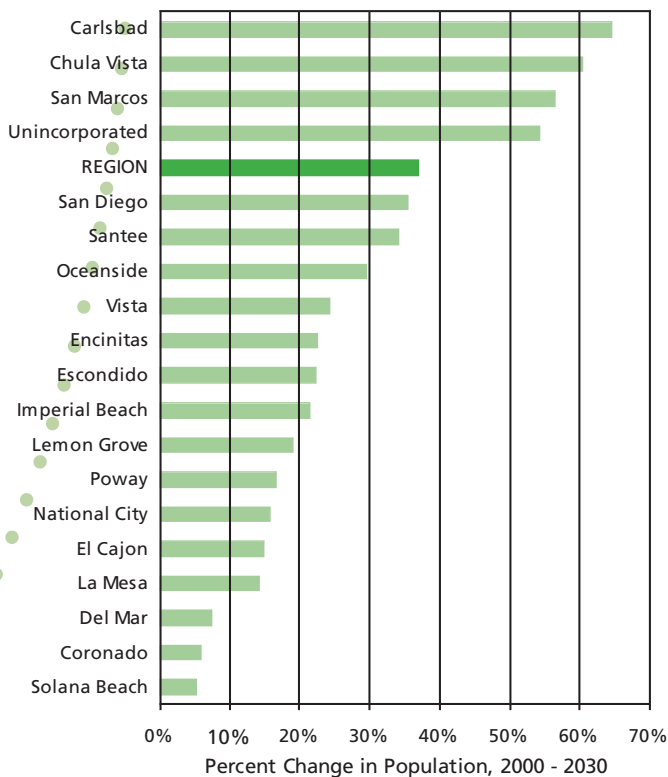


**Table 3**  
**Population Change by Age Group, 2000 – 2030**  
**San Diego Region**

	2000	2030	2000 - 2030 Change	
			Num.	Pct.
0 - 17	723,700	814,700	91,000	13%
18 - 64	1,776,400	2,299,500	523,100	29%
65 - 84	277,300	640,700	363,400	131%
85 and older	36,400	100,200	63,800	175%
Region	2,813,800	3,855,100	1,041,300	37%
Median Age	33.2	38.9	5.7	17%

Source: 2030 Regional Growth Forecast, November 2003, SANDAG.

**Figure 2**  
**Growth Rates Vary Widely Among Jurisdictions**



age will increase by more than five years, from 33.2 to 38.9. Compared to a regional population gain of 37 percent, the juvenile population will grow by only 13 percent, while the number of people age 64 to 84 and 85 and older will grow by 131 percent and 175 percent, respectively. By 2030, fully 19 percent of the region's population will be 65 or older—a higher percentage than is seen today in the state of Florida.

## Jurisdictions

Table 4 summarizes how the one million new residents will likely be distributed among the 19 jurisdictions, based on current land use plans and policies and the County's GP2020. Although the region as a whole will grow by 37 percent, Figure 2 indicates the growth rates vary widely by jurisdiction. Only four jurisdictions will grow faster than the regional rate: Carlsbad, Chula Vista, San Marcos, and the unincorporated area. While these four jurisdictions will see the largest percentage gains in population over the forecast period, it is important to note that the City of San Diego will absorb by far the greatest *number* of people (433,400, a 35% gain).

The projected distribution of new housing units by jurisdiction is shown in Table 5. The general pattern, not surprisingly, follows that of the population forecast. It is significant to note that 18 of the 19 jurisdictions will see a higher percentage increase in population than in housing. The net effect of this is a five-percent gain in the average number of persons per household, from 2.73 in 2000 to 2.88 in 2030.

The forecast of total employment by jurisdiction is the subject of Table 6 and Figure 3. The region is expected to add about 440,000 jobs over the forecast period, a 32 percent increase. Compared to population growth, the growth rates for employment are a little more balanced

among jurisdictions. Eight of the 19 jurisdictions will see faster employment growth than the region as a whole. Five of those are in the North County: Vista, Poway, Oceanside, San Marcos, and Carlsbad. Again, this is due to a relative abundance of vacant land planned for employment use.

Maps 1 and 2 on page 7 group the 19 jurisdictions into six geographic subareas: North County Coastal (Carlsbad, Del Mar, Encinitas, Oceanside, Solana Beach), North County Inland (Escondido, Poway, San Marcos, Vista), East County (El Cajon, La Mesa, Lemon Grove, Santee), South County (Chula Vista, Coronado, Imperial Beach, National City), the City of San Diego, and the unincorporated County of San Diego.

Map 1 shows the distribution of the 2000 to 2030 population growth by these six subareas. The City of San Diego takes the lion's share, absorbing 41 percent of the new residents. The unincorporated area is next, with 23 percent. However, much of that growth comes in the later years of the forecast, as the cities begin to fill up under their current land use plans, and more growth is forced into the unincorporated area. The two North County subareas combine to absorb 20 percent, and the South County takes 12 percent, most of which occurs in the City of Chula Vista.

Map 2 portrays the distribution of employment growth among the same areas. Again, the City of San Diego accounts for the largest share (45%), but the nine North County cities, several with a large stock of vacant employment land, will capture 28 percent of the new jobs. Even though 45 percent of the new jobs will be in the City of San Diego, its share of the region's jobs will drop from today's 56 percent to 54 percent in 2030.

Age and income are two widely used demographic characteristics. The 2030 Forecast projects that the region's

median age will increase by almost six years over the 30-year period. That may be considered bad news by some, but the good news is that our median incomes, adjusted for inflation, are projected to rise by a regional average of 36 percent.

Figure 4 depicts median age by jurisdiction in 2000 and 2030 and is sorted by age in 2000. While median age increases in all jurisdictions over time, the largest increases are seen in Solana Beach (11.0 years), and National City (10.6 years).

**Table 4**  
**Total Population by Jurisdiction**  
**San Diego Region**

					2000 - 2030 Change	
	2000	2010	2020	2030	Num.	Pct.
Carlsbad	78,200	107,300	120,600	128,800	50,500	65%
Chula Vista	173,600	247,900	269,000	278,200	104,600	60%
Coronado	24,100	24,800	25,200	25,500	1,400	6%
Del Mar	4,400	4,600	4,700	4,700	300	8%
El Cajon	94,900	98,600	103,700	109,070	14,200	15%
Encinitas	58,000	64,900	68,400	71,000	13,000	22%
Escondido	133,600	144,700	153,400	163,300	29,700	22%
Imperial Beach	27,000	27,900	30,000	32,800	5,800	22%
La Mesa	54,700	57,000	59,800	62,500	7,800	14%
Lemon Grove	24,900	26,200	27,800	29,700	4,800	19%
National City	54,300	56,100	59,000	62,800	8,600	16%
Oceanside	161,000	189,000	201,500	208,600	47,500	30%
Poway	48,000	51,800	54,500	56,100	8,000	17%
San Diego	1,223,400	1,370,300	1,507,800	1,656,800	433,400	35%
San Marcos	55,000	77,600	82,400	86,000	31,100	56%
Santee	53,000	55,300	61,000	71,100	18,100	34%
Solana Beach	13,000	13,500	13,600	13,700	700	5%
Vista	89,900	97,600	104,600	111,600	21,800	24%
Unincorporated <sup>1</sup>	442,900	436,600	581,600	682,800	239,900	54%
REGION	2,813,800	3,211,700	3,528,600	3,855,100	1,041,300	37%

<sup>1</sup>The County's proposed general plan is designed to accommodate a higher population in 2020 than is forecasted, in part because not all areas that could be developed by 2020 will develop, and some areas will develop at a lower density than contemplated by the plan.

Totals may be affected by rounding.

Source: 2030 Regional Growth Forecast, November 2003, SANDAG.

**Table 5**  
**Total Housing Units by Jurisdiction**  
**San Diego Region**

					2000 - 2030 Change	
	2000	2010	2020	2030	Num.	Pct.
Carlsbad	33,800	45,300	49,000	50,700	16,900	50%
Chula Vista	59,500	81,500	86,400	87,500	28,000	47%
Coronado	9,500	9,600	9,700	9,900	400	4%
Del Mar	2,600	2,600	2,600	2,600	0	2%
El Cajon	35,200	35,800	36,600	37,500	2,300	7%
Encinitas	23,800	26,200	26,900	27,200	3,400	14%
Escondido	45,100	48,000	49,600	51,600	6,500	15%
Imperial Beach	9,700	9,800	10,300	10,900	1,200	12%
La Mesa	24,900	25,300	25,700	26,000	1,100	4%
Lemon Grove	8,700	9,000	9,300	9,700	1,000	11%
National City	15,400	15,700	16,200	17,000	1,600	10%
Oceanside	59,600	67,800	69,800	70,700	11,100	19%
Poway	15,700	16,700	17,100	17,200	1,500	10%
San Diego	469,700	520,000	558,100	604,400	134,700	29%
San Marcos	18,900	27,200	28,600	29,200	10,300	55%
Santee	18,800	19,400	20,800	23,700	4,900	26%
Solana Beach	6,500	6,500	6,600	6,600	100	2%
Vista	29,800	31,900	33,300	34,600	4,800	16%
Unincorporated	152,900	167,800	198,000	236,900	84,000	55%
REGION	1,040,100	1,166,100	1,254,600	1,353,900	313,800	30%

Totals may be affected by rounding.

Source: 2030 Regional Growth Forecast, November 2003, SANDAG.

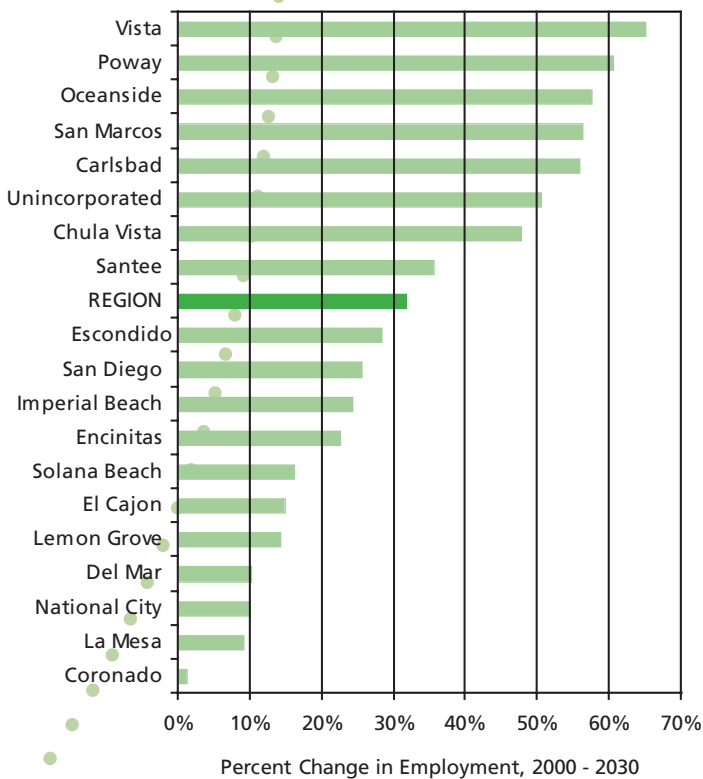
**Table 6**  
**Total Employment<sup>1</sup> by Jurisdiction**  
**San Diego Region**

	2000 - 2030 Change				Num.	Pct.
	2000	2010	2020	2030		
Carlsbad	50,800	57,300	65,700	79,200	28,400	56%
Chula Vista	53,700	59,800	68,900	79,400	25,700	48%
Coronado	29,900	30,100	30,200	30,300	400	1%
Del Mar	3,800	3,900	4,100	4,200	400	10%
El Cajon	41,300	42,800	44,500	47,500	6,200	15%
Encinitas	24,200	26,100	28,300	29,700	5,500	23%
Escondido	49,700	53,000	56,900	63,800	14,100	28%
Imperial Beach	3,900	4,400	4,800	4,900	1,000	24%
La Mesa	25,400	26,000	26,600	27,800	2,400	9%
Lemon Grove	8,600	8,900	9,400	9,800	1,200	14%
National City	24,800	25,200	25,700	27,300	2,500	10%
Oceanside	39,600	44,500	51,400	62,400	22,800	58%
Poway	21,800	26,400	31,600	35,000	13,200	61%
San Diego	777,600	866,100	931,900	976,000	198,400	26%
San Marcos	30,400	34,000	38,600	47,400	17,000	56%
Santee	16,100	17,400	19,200	21,800	5,700	36%
Solana Beach	8,900	9,600	9,900	10,300	1,400	16%
Vista	33,800	39,900	47,000	55,800	22,000	66%
Unincorporated	140,300	153,200	178,100	211,200	70,900	51%
<b>REGION</b>	<b>1,384,600</b>	<b>1,528,600</b>	<b>1,672,800</b>	<b>1,823,800</b>	<b>439,200</b>	<b>32%</b>

<sup>1</sup>Includes uniformed military.  
Totals may be affected by rounding.  
Source: 2030 Regional Growth Forecast, November 2003, SANDAG.

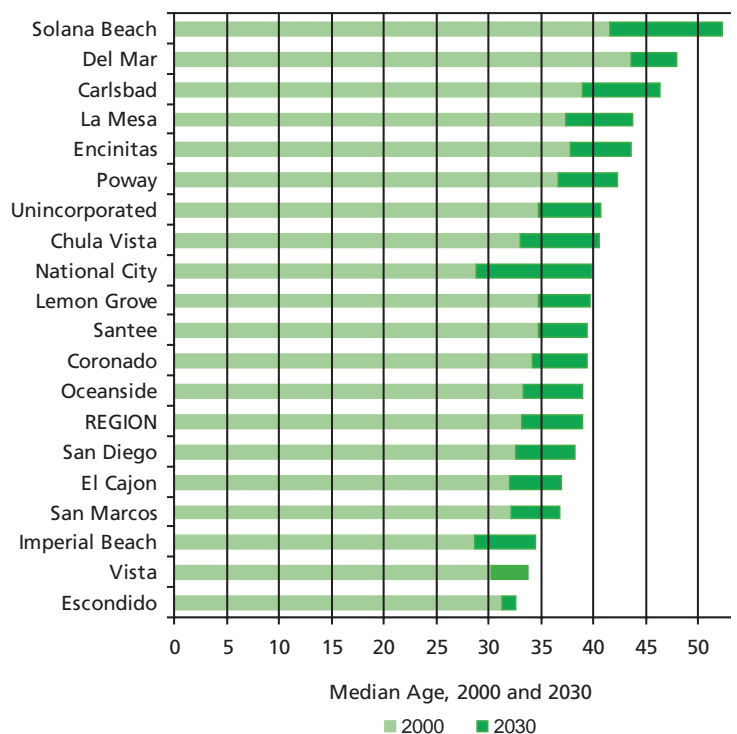
**Figure 3**

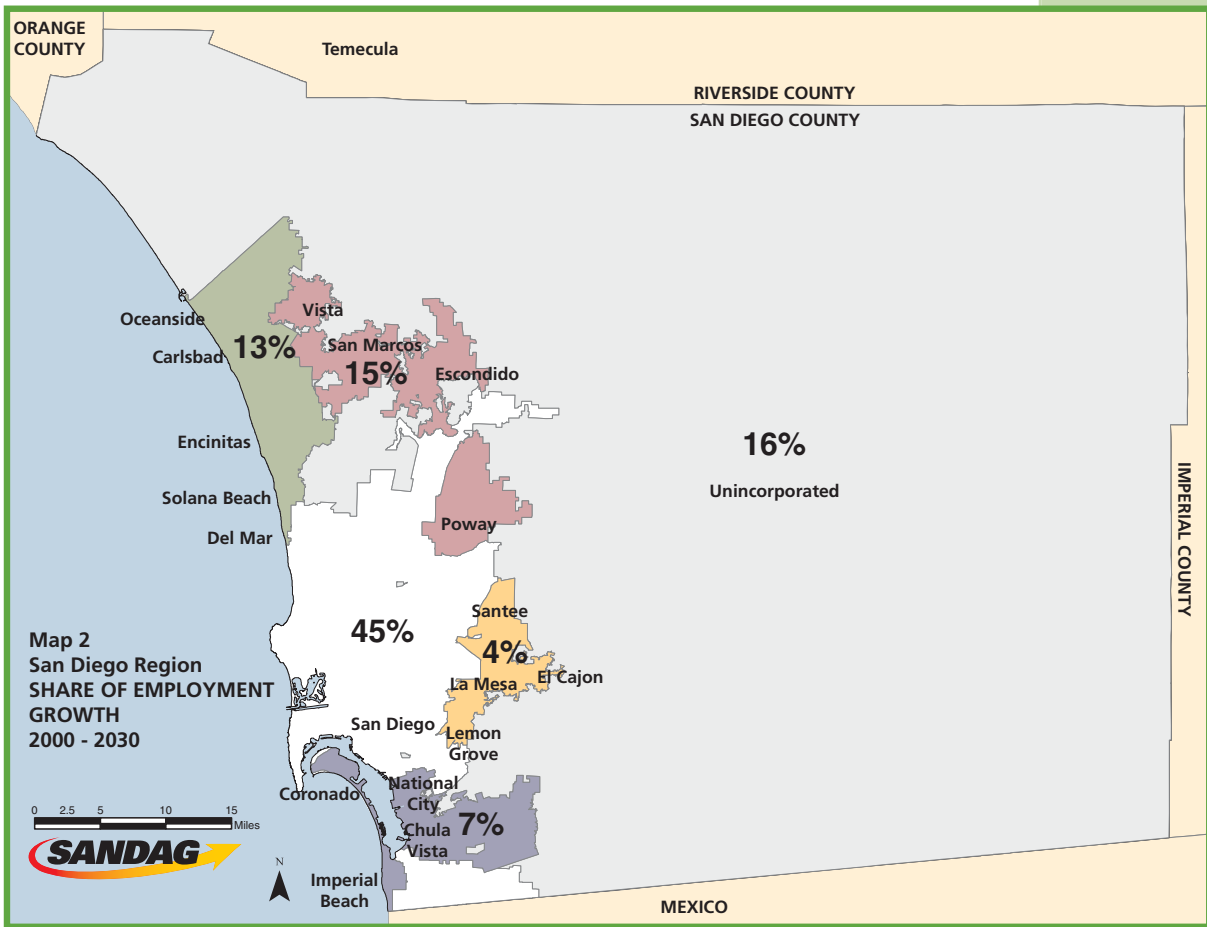
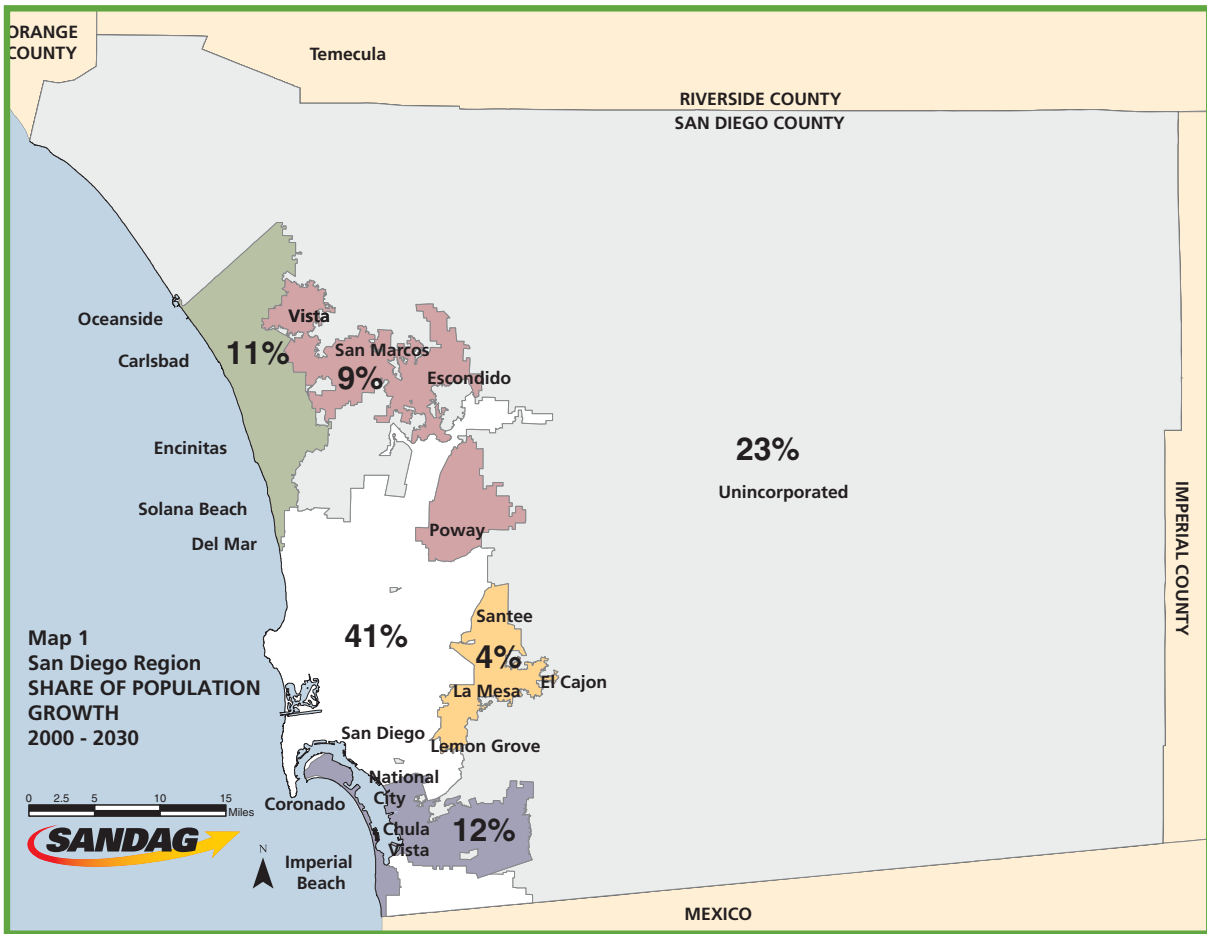
**North County Cities Show Greatest Gains in Employment**



**Figure 4**

**We Are Getting Older...**







**info**

info presents information produced as part of the San Diego Association of Governments' overall planning program. The series contains population, housing, employment, land use, transportation, criminal justice and other data, as well as occasional reports on other subjects of general interest. This report is financed with federal funds from the U.S. Department of Transportation, state funds from Caltrans, and local funds from SANDAG member jurisdictions.

**San Diego Association of Governments**  
401 B Street • Suite 800  
San Diego, CA 92101  
(619) 699-1900 • (619) 699-1905

**SourcePoint**

SourcePoint is a chartered nonprofit corporation of SANDAG.

**SANDAG Member Agencies:**

- Carlsbad
- Chula Vista
- Coronado
- Del Mar
- El Cajon
- Encinitas
- Escondido
- Imperial Beach
- La Mesa
- Lemon Grove
- National City
- Oceanside
- Poway
- San Diego
- San Marcos
- Santee
- Solana Beach
- Vista
- County of San Diego

**Advisory Agencies:**

- Imperial County, Caltrans, Metropolitan Transit System, North San Diego County Transit Development Board, U.S. Department of Defense, San Diego Unified Port District, San Diego County Water Authority, Baja California/Mexico*

**Background**

The 2030 Regional Growth Forecast represents the best assessment of the changes we can anticipate for the region and its communities based on the most current available information and well-proven computer models. It is meant to help policy and decision makers prepare for the future and is 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. Each jurisdiction had several opportunities to provide and corroborate their forecast inputs as well as review and comment on the forecast results.

The forecast process includes two phases. First, a forecast for the entire region is prepared, based largely on economic trends and the associated demographic characteristics. The second phase allocates the regional forecast to jurisdictions and smaller geographic areas based on the region's general and community plans. In addition, the forecast process now employs a new Interregional Commuting Model (ICM) to estimate the number of households located outside of the region that contain at least

one San Diego worker. A full description of SANDAG's forecasting process and the computer models used is contained in the publication *Final 2030 Forecast Process and Model Documentation*, available on the SANDAG Web site ([www.sandag.org](http://www.sandag.org)).

It has been apparent since the mid-1990s that our local land use plans and policies, in aggregate, cannot support the long-range economic and population growth that is anticipated for the region. In part, this is because the local plans typically have a shorter horizon year than the forecast does. General plans and community plans are intended to guide development within a jurisdiction over a certain period of time, and then be updated to reflect changing conditions.

While the forecast looks out to the year 2030, the horizon year of current local plans is typically 2010 or 2020. As those plans evolve, future forecasts may result in different outcomes. The Regional Comprehensive Plan (RCP) is intended to provide guidance for future plan changes. Basing our forecasts on current plans and policies provides us with an important tool to help monitor the RCP's progress in maintaining and improving the region's quality of life.