The 18 cities and county government are SANDAG serving as the forum for regional decision-making. SANDAG builds consensus; plans, engineers, and builds public transit; makes strategic plans; obtains and allocates resources; and provides information on a broad range of topics pertinent to the region’s quality of life.

<table>
<thead>
<tr>
<th>BOARD OF DIRECTORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>SANDAG</td>
</tr>
</tbody>
</table>

City of Carlsbad
Hon. Matt Hall, Mayor
(A) Hon. Ann Kulchin, Mayor Pro Tem
(A) Hon. Farrah Douglas, Councilmember

City of Chula Vista
Hon. Cheryl Cox, Mayor
(A) Hon. Pamela Bensoussan, Councilmember
(A) Hon. Rudy Ramirez, Councilmember

City of Coronado
Hon. Carrie Downey, Councilmember
(A) Hon. Al Ovrom, Mayor Pro Tem
(A) Hon. Michael Woiwode, Councilmember

City of Del Mar
Hon. Carl Hilliard, Mayor
(A) Hon. Terry Sinnott, Deputy Mayor
(A) Hon. Mark Filanc, Councilmember

City of El Cajon
Hon. Mark Lewis, Mayor
(A) Vacant

City of Encinitas
Hon. Jerome Stocks, Mayor
(A) Hon. Kristin Gaspar, Deputy Mayor
(A) Hon. Teresa Barth, Councilmember

City of Escondido
Hon. Sam Abed, Mayor
(A) Hon. Marie Waldron, Councilmember
(A) Hon. Ed Gallo, Councilmember

City of Imperial Beach
Hon. Jim Janney, Mayor
(A) Hon. Jim King, Mayor Pro Tem
(A) Hon. George Gastil, Councilmember

City of La Mesa
Hon. Art Madrid, Mayor
(A) Hon. Ruth Sterling, Councilmember
(A) Vacant

City of Lemon Grove
Hon. Mary Teresa Sessom, Mayor
(A) Hon. Jerry Jones, Mayor Pro Tem
(A) Hon. George Gastil, Councilmember

City of National City
Hon. Ron Morrison, Mayor
(A) Hon. Rosalie Zarate, Councilmember
(A) Hon. Alejandra Sotelo-Solis, Vice Mayor

City of Oceanside
Hon. Jim Wood, Mayor
(A) Hon. Jack Feller, Councilmember
(A) Hon. Gary Felen, Councilmember

City of Poway
Hon. Don Higginson, Mayor
(A) Hon. Jim Cunningham, Councilmember
(A) Hon. John Mullin, Councilmember

City of San Diego
Hon. Jerry Sanders, Mayor
(A) Hon. Lorie Zapf, Councilmember
(A) Hon. David Alvarez, Councilmember
Hon. Anthony Young, Council President
(A) Hon. Todd Gloria, Councilmember
(A) Hon. Sherri Lightner, Councilmember

City of San Marcos
Hon. Jim Desmond, Mayor
(A) Hon. Hal Martin, Vice Mayor
(A) Hon. Rebecca Jones, Councilmember

City of Santee
Hon. Jack Dale, Councilmember
(A) Hon. John Minto, Vice Mayor
(A) Hon. Rob McWils, Councilmember

City of Solana Beach
Hon. Lesa Heebeiner, Councilmember
(A) Hon. Mike Nichols, Councilmember
(A) Hon. Dave Roberts, Deputy Mayor

City of Vista
Hon. Judy Ritter, Mayor
(A) Hon. Steve Gronke, Councilmember
(A) Hon. John Aguilera, Mayor Pro Tem

County of San Diego
Hon. Ron Roberts, Chairman
(A) Hon. Greg Cox, Vice Chair
(A) Hon. Pam Slater-Price, Supervisor
Hon. Bill Horn, Supervisor
(A) Hon. Dianne Jacob, Supervisor

Advisory Members

Imperial County
Hon. John Renison, Supervisor, District 1
(A) Mark Baza, Executive Director, ICTC

California Department of Transportation
Malcolm Dougherty, Acting Director
(A) Laurie Berman, District 11 Director

Metropolitan Transit System
Harry Mathis, Chairman
(A) Hon. Al Ovrom

North County Transit District
Hon. Chris Orlando, Chairman
(A) Dave Roberts
(A) Mark Packard

U.S. Department of Defense
CAPT Clifford Maurer, USN, CEC
Southwest Division Naval Facilities Engineering Command
(A) CAPT James W. Wink, USN, CEC
Southwest Division Naval Facilities Engineering Command

San Diego Unified Port District
Lou Smith, Chairman
(A) Lee Burdick, Secretary

San Diego County Water Authority
Javier Saunders, Director
(A) John Linden, Director

Southern California Tribal Chairmen’s Association
Hon. Edwin ‘Thorpe’ Romero
Barona Band of Mission Indians
Hon. Allen Lawson
San Pasqual Band of Diegueño Indians
(A) Robert Smith,
(Pala Band of Mission Indians)

Mexico
Hon. Remedios Gómez-Arnau
Cónsul General of Mexico
Hon. Martha E. Rosas,
Deputy Cónsul General of Mexico

As of March 15, 2012
Table of Contents

EXECUTIVE SUMMARY .......................................................................................................................... 1
  Moving in the Right Direction ........................................................................................................... 1
  Areas for Improvement ....................................................................................................................... 1

URBAN FORM AND TRANSPORTATION ............................................................................................. 5
  Share of New Housing Units and Jobs Located Within Smart Growth Opportunity Areas .......... 6
  Share of New Housing Units within County Water Authority Water Service Boundary .......... 6
  Annual Transit Ridership .................................................................................................................. 7
  Commute Mode Shares ................................................................................................................... 8
  Travel Times and Volumes for Key Transportation Corridors ....................................................... 9
  Annual Hours of Traffic Delay Per Traveler .................................................................................... 15
  Regional Crime Rate ....................................................................................................................... 15
  Conclusion ....................................................................................................................................... 16

HOUSING .................................................................................................................................................. 17
  Housing Opportunity Index .............................................................................................................. 17
  Percent of Households With Housing Costs Greater Than 35 Percent of Income ....................... 18
  Ratio of New Jobs to New Housing Units ....................................................................................... 19
  Share of New Housing Units by Income Category .......................................................................... 21
  Vacancy Rates ................................................................................................................................ 23
  Percent of Households Living in Overcrowded Conditions ............................................................ 23
  Number of Households on the Waiting List for Section 8 Vouchers ............................................ 24
  Conclusion ....................................................................................................................................... 24

HEALTHY ENVIRONMENT .................................................................................................................. 25
  Habitat Conserved Within Designated Preserve Areas ................................................................. 25
  Percent of Preserve Area Actively Maintained .............................................................................. 27
  Implementation of RCP Strategic Initiatives ................................................................................... 27
  Number of Beach Mile Closure Days ............................................................................................... 28
  Beach Widths .................................................................................................................................. 29
  Impaired Waterbodies ..................................................................................................................... 29
  Air Quality ........................................................................................................................................ 30
  Conclusion ....................................................................................................................................... 31

ECONOMIC PROSPERITY ................................................................................................................... 33
  Labor Force Educational Attainment ............................................................................................... 34
  Employment Growth in High-Wage Economic Clusters ............................................................... 34
  Regional Unemployment Rate Compared to California and the United States ......................... 36
  Real Per Capita Income Compared to California and the United States ....................................... 37
  Regional Poverty Rate Compared to California and the United States ......................................... 37
  Conclusion ....................................................................................................................................... 38
Table of Contents (cont'd)

PUBLIC FACILITIES ................................................................................................................................................ 39
Water Consumption .................................................................................................................................................. 39
Diversity of Water Supply .................................................................................................................................. 39
Recycled Water Use ........................................................................................................................................... 40
Energy Supply and Use ..................................................................................................................................... 41
Share and Types of Energy Produced from Renewable Resources ................................................................. 42
Per Capita Peak Demand for Electricity .............................................................................................................. 43
Electricity Consumption by Sector ..................................................................................................................... 43
Natural Gas Consumption by Sector .................................................................................................................. 44
Percent of Solid Waste that is Recycled .............................................................................................................. 45
Landfill Space Available ..................................................................................................................................... 46
Conclusion ........................................................................................................................................................ 47

BORDERS ............................................................................................................................................................... 49
Interregional Traffic Volumes into San Diego from Surrounding Counties and Baja California ...................... 49
Border Wait Times ............................................................................................................................................. 50
Participation in SENTRI Lanes ............................................................................................................................. 51
Conclusion ........................................................................................................................................................ 51
# List of Figures

1. Share of New Housing Units in SGOAs, 2004 to 2009 ................................................................................. 6
2. New Housing Units in the County Water Authority Service Area, 2006 to 2009 ........................................ 7
3. San Diego Regional Annual Transit Boardings, 2000 to 2011 ................................................................. 7
4. Regional Commute Mode Shares, 2010 ........................................................................................................ 8
5. Drive Alone Mode Shares, 2000 to 2010 ..................................................................................................... 8
6. Alternative Commute Mode Shares, 2005 to 2010 .................................................................................. 9
7. Annual Hours of Traffic Delay Per Traveler During Peak Periods, 2000 to 2010 ...................................... 15
8. FBI Index Crimes Per 1,000 People, 2000 to 2010 ..................................................................................... 15
9. Housing Opportunity Index, 2000 to 2011 .............................................................................................. 18
10. Percent of Households Paying 35 Percent or More of Income for Housing, 2000 to 2010 ..................... 18
11. Annual Income Needed to Afford Fair Market Rent, 2000 to 2010 .......................................................... 19
12. Total New Jobs Per New Housing Unit Ratio, 2001 to 2010 ...................................................................... 20
13. Total Housing Units Permitted in the San Diego Region by Income Category, 2003-2011 .................... 21
15. Overcrowding in the Region, 2000 to 2010 ............................................................................................. 23
16. MSCP South County and MHCP Land Conservation by Year, 1997 to 2011 with 2020 and 2030 Targets .... 26
17. Land Management by Source, 2011 ........................................................................................................ 27
18. Weather-Adjusted Beach Mile Closure Days, 2001 to 2010 ................................................................. 28
20. Number of Days AQI > 100, 1999 to 2011 ............................................................................................ 31

Labor Force Educational Attainment, 2005 to 2010 .................................................................................... 34

23. Real Per Capita Income in San Diego, California and the United States in Inflation-Adjusted 2009 Dollars, 2001 to 2009 ....................................................................................... 37
24. Percent of Residents Living in Poverty in San Diego, California and the United States, 2000 to 2010 .... 37
25. Water Consumption, 2000 to 2011 ......................................................................................................... 39
27. Amount of Recycled Water Used, 2000 to 2010 .................................................................................... 41
28. Energy Sources in the San Diego Region, 2000 and 2010 ...................................................................... 41
29. Share of Energy Produced from Renewable Resources ........................................................................ 42
30. Breakdown of Renewable Energy Sources for 2010 ........................................................................... 42
31. San Diego Annual Per Capita Electricity Peak Demand, 2000 to 2010 ..................................................... 43
32. Existing and Projected Electricity Consumption (kWh), San Diego Region .............................................. 44
33. Existing and Projected Natural Gas Consumption by Sector, San Diego Region .................................... 45
34. Percent of Solid Waste Diverted From Landfills, 2000 to 2009 .............................................................. 46
35. San Diego Region Average Weekday Traffic Volumes to and From Orange, Imperial, and Riverside Counties and Tijuana, Baja California, Mexico, 2000 to 2010 ........................................ 49
36. Northbound Pedestrian Border Crossing from Baja California Into San Diego, 2000 to 2010 ............... 50
List of Figures (cont’d)

38 Average Border Wait Times - Northbound Into San Diego From Tijuana, Mexico, 2008 to 2010 ..........................50
39 SENTRI Participants, 2006 to 2011 .................................................................................................................51

List of Tables

1 Population, Housing Units, and Job Growth in the San Diego Region, 2000 to 2010 .................................2
2 Travel Times in Key Auto Corridors, 2005 to 2011 ........................................................................................10
3 Travel Volumes in Key Auto Corridors, 2005 to 2011 ....................................................................................12
4 Transit Passenger Volumes in Key Transit Corridors at Specific Screenline Locations, 2005 to 2011 ............13
5 Total Jobs Per Housing Unit Ratio, 2001 to 2010 ..........................................................................................20
6A Share of New Housing Units by Income Category, January 1, 2003 through December 31, 2010 ..............22
6B Share of New Housing Units by Income Category, January 1, 2010 through December 31, 2011 ..........22
7 Beach Widths and Targets of Shoreline Segments San Diego Region (in feet), 2000 to 2010 ....................29
8 Landfills Located in the San Diego Region ......................................................................................................47

List of Maps

1 Key Auto Corridor Travel Times, San Diego County, 2011 ........................................................................11
2 San Diego Region Habitat Conservation Planning Areas .................................................................................25
The Regional Comprehensive Plan (RCP), adopted by the SANDAG Board of Directors in 2004, is the long-term planning framework for the San Diego region. It defines a vision and lays out goals, key issues, and needed actions in areas ranging from urban form and transportation to public facilities and borders. It summarizes where the region was in 2004, where the region wants to be by 2030, and what the region needs to do to get there. The RCP also calls for ongoing monitoring to track progress toward meeting the goals outlined in the Plan.

In 2006, SANDAG released the Regional Comprehensive Plan: Establishing a Baseline for Monitoring Performance (Baseline Report), to be used to benchmark progress on an annual basis. The 2010-2011 RCP Biennial Performance Monitoring Report (2010-2011 Monitoring Report) is the fourth since the Baseline Report was accepted by the Board in October 2006.

The 2010-2011 Monitoring Report includes the most recent data available for each indicator, typically from either 2010 or 2011. For some indicators, there is a one year delay or longer in reporting; in these cases, data from the most recent year available are included. For all indicators, the most recent data are provided and related to the Baseline Report.

Based on the data collected for the 2010-2011 Monitoring Report, the indicators illustrate those areas in which the region appears to be moving in the right direction and those in which improvement is needed.

**Moving in the Right Direction**

- The regional crime rate continues to decrease.
- Air quality continues to improve.
- Water consumption continues to decrease.
- The diversity of our water supply has increased.
- The share of energy produced from renewable resources continues to increase.
- The percent of solid waste that is recycled continues to increase.

**Areas for Improvement**

- Beach widths continued to decrease since 2008.
- Per capita peak demand for electricity, and electricity consumption has slowly increased.

It should be noted that a number of indicators are likely demonstrating the effects of the economic recession. For example, there appear to be reductions in travel volumes across the board. In terms of vehicular traffic, volumes are likely to be down due in part to recession and in part due to increased investment in infrastructure and TDM programs.

In some issue areas, the impact of the economy has largely been negative. For example, the regional poverty rate has continued to increase.

Throughout the 2010-11 Monitoring Report, indicator data are in certain cases related to growth in population, housing, or jobs, as shown in Table 1.
Table 1
Population, Housing Units, and Job Growth in the San Diego Region, 2000 to 2010

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2010</th>
<th>Percent Change 2000-2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>2,813,833</td>
<td>3,095,313</td>
<td>10%</td>
</tr>
<tr>
<td>Housing Units</td>
<td>1,040,149</td>
<td>1,158,076</td>
<td>11%</td>
</tr>
<tr>
<td>Wage &amp; Salary Jobs¹</td>
<td>1,205,700</td>
<td>1,299,800</td>
<td>8%</td>
</tr>
</tbody>
</table>

Sources: Census 2000; Census 2010; SANDAG Annual Population and Housing Estimates; California Employment Development Department¹ Does not include military and self-employed.

Some of the indicators included in this report use the American Community Survey (ACS) as their data source. The ACS is the United States (U.S.) Census Bureau’s new program for collecting and disseminating demographic, socio-economic, and housing data on an annual basis. Approximately one out of 40 addresses (2.5% of the population) is surveyed each year, which equals about three million addresses a year nationally. In San Diego County, one out of 40 equates to roughly 28,800 addresses each year.

Please note that ACS is not designed to count the population, but rather to collect person and household characteristic information. The official Census (short form), which counts the entire population, still will be held every ten years.

Annual indicators were selected as part of the RCP, based upon key policy areas and data availability. The list of indicators is revised periodically as new plans are adopted, to reflect indicators included in those plans. There are no new indicators for this reporting period.
## Biennial Indicators for Monitoring the Regional Comprehensive Plan

<table>
<thead>
<tr>
<th>URBAN FORM AND TRANSPORTATION</th>
<th>1</th>
<th>Share of new housing units and jobs located in Smart Growth Opportunity Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2</td>
<td>Share of new housing units within County Water Authority water service boundary</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>Annual transit ridership</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>Commute mode shares</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>Travel times and volumes for key transportation corridors</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>Annual hours of traffic delay per traveler</td>
</tr>
<tr>
<td></td>
<td>7</td>
<td>Regional crime rate</td>
</tr>
<tr>
<td>HOUSING</td>
<td>8</td>
<td>Housing Opportunity Index</td>
</tr>
<tr>
<td></td>
<td>9</td>
<td>Percent of households with housing costs greater than 35 percent of income</td>
</tr>
<tr>
<td></td>
<td>10</td>
<td>Ratio of new jobs to new housing units</td>
</tr>
<tr>
<td></td>
<td>11</td>
<td>Share of new and existing housing units by structure type and income category</td>
</tr>
<tr>
<td></td>
<td>12</td>
<td>Vacancy rates</td>
</tr>
<tr>
<td></td>
<td>13</td>
<td>Percent of households living in overcrowded conditions</td>
</tr>
<tr>
<td></td>
<td>14</td>
<td>Number of households on the waiting list for Section 8 vouchers</td>
</tr>
<tr>
<td>HEALTHY ENVIRONMENT</td>
<td>15</td>
<td>Habitat conserved within designated preserve areas</td>
</tr>
<tr>
<td></td>
<td>16</td>
<td>Percent of preserve areas actively maintained</td>
</tr>
<tr>
<td></td>
<td>17</td>
<td>Number of beach mile closure days</td>
</tr>
<tr>
<td></td>
<td>18</td>
<td>Impaired waterbodies</td>
</tr>
<tr>
<td></td>
<td>19</td>
<td>Beach widths</td>
</tr>
<tr>
<td></td>
<td>20</td>
<td>Air Quality</td>
</tr>
<tr>
<td>ECONOMIC PROSPERITY</td>
<td>21</td>
<td>Labor force educational attainment</td>
</tr>
<tr>
<td></td>
<td>22</td>
<td>Employment growth in high-wage economic clusters</td>
</tr>
<tr>
<td></td>
<td>23</td>
<td>Regional unemployment rate compared to California and the United States</td>
</tr>
<tr>
<td></td>
<td>24</td>
<td>Real per capita income compared to California and the United States</td>
</tr>
<tr>
<td></td>
<td>25</td>
<td>Regional poverty rate compared to California and the United States</td>
</tr>
<tr>
<td>PUBLIC FACILITIES</td>
<td>26</td>
<td>Water consumption</td>
</tr>
<tr>
<td></td>
<td>27</td>
<td>Diversity of water supply</td>
</tr>
<tr>
<td></td>
<td>28</td>
<td>Recycled water use</td>
</tr>
<tr>
<td></td>
<td>29</td>
<td>Energy supply and use</td>
</tr>
<tr>
<td></td>
<td>30</td>
<td>Share and types of energy produced from renewable resources</td>
</tr>
<tr>
<td></td>
<td>31</td>
<td>Per capital peak demand for electricity</td>
</tr>
<tr>
<td></td>
<td>32</td>
<td>Electricity consumption by sector</td>
</tr>
<tr>
<td></td>
<td>33</td>
<td>Natural gas consumption by sector</td>
</tr>
<tr>
<td></td>
<td>34</td>
<td>Percent of solid waste that is recycled</td>
</tr>
<tr>
<td></td>
<td>35</td>
<td>Landfill space available</td>
</tr>
<tr>
<td>BORDERS</td>
<td>36</td>
<td>Interregional traffic volumes into San Diego from surrounding counties and Baja California</td>
</tr>
<tr>
<td></td>
<td>37</td>
<td>Border wait times</td>
</tr>
<tr>
<td></td>
<td>38</td>
<td>Participation in SENTRI Lanes</td>
</tr>
</tbody>
</table>
Our land use and urban design decisions determine how well our communities serve us in our daily lives, including the quality of our travel choices and our personal safety. The Regional Comprehensive Plan (RCP) encourages urban development with an appropriate mix of uses designed to create safe and healthy communities. In addition, the relationship between regional transportation plans and local land use plans and policies is crucial to ensuring that the region’s transportation system efficiently connects our communities. The Urban Form and Transportation indicators track progress toward achieving these goals.

**Share of New Housing Units and Jobs Located Within Smart Growth Opportunity Areas**

Data is limited for this indicator this year, due to the nature of the data source. Every ten years, SANDAG benchmarks its estimates program to the newly completed Census data, in this case, the 2010 Census. Therefore, reporting for this indicator will begin anew with each ten-year cycle. New housing unit and job data for the Smart Growth Opportunity Areas (SGOAs) are not comparable to data reported in prior reports. As a result, any changes in new housing units and/or jobs could reflect these changes rather than true increases or decreases in SGOAs.

At this time, there are only SGOA total housing unit and job data available for 2010. There were 233,190 housing units in SGOAs. This represents 20 percent of the region’s housing stock. There were 485,239 jobs in SGOAs, representing 35 percent of the region’s jobs. The next RCP Monitoring Report will update the share of new housing units indicator because there will be more than one data point to calculate new units.

The analysis below is from the last report:

While the total number of new housing units has decreased since 2006 with the downturn in the economy, the share of new units in SGOAs continues to increase, as shown in Figure 1. There were 8,600 new units in 2007-2008 and 5,109 new units in 2008-2009, with 41 percent and 44 percent of those in SGOAs, respectively.

The SGOAs experienced a net gain of 11,654 jobs, representing a 2 percent increase between 2005 and 2008. In areas of the region outside of the SGOAs, there was a net loss of 9,355 jobs; therefore the region as a whole experienced an increase of 2,299 jobs between 2005 and 2008. As of 2008, 34 percent of the region’s total jobs were located in SGOAs. Data for 2006 and 2007 were unavailable.

With only five years of housing data and three years of jobs data for this indicator, it is unclear how many new housing units and jobs can be anticipated annually in SGOAs and which factors may be influencing growth in these areas. Continued monitoring is required to identify trends.
Figure 1
Share of New Housing Units in SGOAs, 2004 to 2009

Source: SANDAG Current Estimates Program

Share of New Housing Units within County Water Authority Water Service Boundary

Again, due to SANDAG benchmarking its estimate program to the 2010 Census (see the indicator above), previous data are not comparable. As with the previous indicator, reporting for this indicator will refresh with each ten-year cycle. The 2010 estimates show 1,121,276 total housing units in San Diego County Water Authority (Water Authority) service boundaries, reflecting 97 percent of the region’s housing stock. The next report will update this indicator with the number of new units.

The analysis below is from the last report:

As shown in Figure 2, the number of new housing units in the Water Authority service boundary accounted for more than 100 percent of the change in housing units in the San Diego region between 2007 and 2008. While the number of new units in the Water Authority service boundary was 8,944 during 2008, the net increase in housing units for the region as a whole was 8,600. This was due to the 2007 wildfires that caused a loss of homes in other areas of the region. A smaller share of housing units built in the Water Authority service boundary during 2009 (90%) than previous years also may be due to rebuilding from the fires in other areas. As in previous years, these data signify progress toward the RCP goal of focusing population and job growth away from rural areas and closer to existing and planned job centers and public facilities.
Regional transit ridership has fluctuated in recent years. Transit boarding increased dramatically between 2007 and 2009. The number of transit boardings decreased by 11 percent between 2009 and 2010. Boardings began to rise again in 2011. This variation in boardings may be a reflection of gas prices, which peaked in 2008 and began subsiding in 2009. In 2011, gas prices began climbing again, which also may be associated with that year’s boardings increase. Additionally, transit boardings may be down from 2009 because of the continued economic recession.
Commute Mode Shares

As shown in Figures 4 through 6, the regional mode split for primary mode of commute to work remains stable. While there appears to have been a slight increase in the share of workers who drove alone between 2008 and 2010, this change is not statistically significant. The number of commuters driving alone has remained stable since 2006. Alternative commute modes also remained stable since 2008, with no statistically significant changes.

Figure 4
Regional Commute Mode Shares, 2010

[Diagram showing regional commute mode shares with Drive Alone at 76%, Car or Vanpool at 10%, Public Transit at 3%, Walk, Bike, Other at 5%, and Worked at Home at 6%]

Source: American Community Survey, 1-Year Estimate. U.S. Census Bureau

Figure 5
Drive Alone Commute Mode Shares, 2000 to 2010

[Graph showing the percentage of commuters who drove alone from 2000 to 2010, with a slight increase from 2008 to 2010]

Source: American Community Survey, 1-Year Estimate. U.S. Census Bureau
Travel Times and Volumes for Key Transportation Corridors

The RCP includes the goals of reducing traffic congestion on freeways and arterials and developing a network of fast, convenient, high-quality transit services that are competitive with drive-alone travel times during peak periods. Progress toward these goals can be measured by evaluating travel times and volumes for key auto and transit corridors.

Travel time and volume data on freeways are provided by the Performance Measurement System (PeMS), a Web-based system used for reporting and monitoring the performance of the freeway system. Freeway detector stations collect volume and lane occupancy information every 30 seconds.

It should be noted that the data presented in Map 1 and Table 2 do not represent “door-to-door” commute times, but rather, trip time once on the freeway. Travel times are representative only of a freeway trip; average travel times are computed from an aggregation of freeway loop detector data. Accordingly, travel time monitoring currently is limited to freeway segments and the availability of freeway loop detector stations; thus, all segments shown in Map 1 and Table 2 are confined to each respective freeway.

Improvement of the PeMS is an ongoing effort since its initial development and the release of the first PeMS version dating back to the late 1990s. Key PeMS enhancements have generally focused on assessing and improving the quality of the data and performance measures that the PeMS provides. Specific enhancements currently being developed for the San Diego region under the PeMS multimodal project will allow the PeMS to incorporate real-time transit and arterial data. Through this effort, the PeMS will have the ability to measure usage and travel time data for both transit and arterials, including the estimation of on-ramp wait times. This additional data will better approximate “door-to-door” travel times. PeMS analysis of key performance measures also will be enhanced by reporting an estimated travel time reliability factor. Once these PeMS enhancements are completed, they will be incorporated in future monitoring reports.2

2 Additionally, travel times and volumes reported for previous years in the 2008 RCP Monitoring Report may differ from those reported in last year’s report as loop detection capability has been enhanced and now more accurately reflects the start and end points of the designated freeway segments.
Travel times shown in Table 2 differ from those presented in the 2050 Regional Transportation Plan (RTP) for the following reason:

- RTP travel times are model based, whereas the reported travel times represent actual observed data. RTP travel times represent “door-to-door” commute times that take into account road configuration, assigned traffic volume, and any intersection controls, whereas the travel times listed below only include trip time once on the freeway. However, as indicated above, the PeMS will have the ability to measure arterial travel times to approximate RTP door-to-door travel times for future reports.

Between 2006 and 2011, commute times decreased in most corridors.

Table 2
Travel Times in Key Auto Corridors, 2005 to 2011

<table>
<thead>
<tr>
<th>No.</th>
<th>Corridor</th>
<th>Direction</th>
<th>AM Peak</th>
<th>PM Peak</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I-5 Oceanside to Downtown SD</td>
<td>SR 76 to Front St</td>
<td>55</td>
<td>54</td>
</tr>
<tr>
<td>2</td>
<td>I-15 Escondido to Downtown SD</td>
<td>SR 78 to A St via SR 163</td>
<td>46</td>
<td>47</td>
</tr>
<tr>
<td>3</td>
<td>SR 78 Escondido to Carlsbad</td>
<td>I-5 to I-15</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td>4</td>
<td>SR 94 El Cajon to Downtown SD</td>
<td>El Cajon Blvd to F St via SR 125/SR 94</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>5</td>
<td>I-8 El Cajon to Downtown SD</td>
<td>El Cajon Blvd to A St via SR 163</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>6</td>
<td>SR 52 Santee to Kearny Mesa</td>
<td>SR 125 to I-805</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>7</td>
<td>I-805 Mid-City to Sorrento Mesa</td>
<td>I-8 to I-5</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>8</td>
<td>I-805 Chula Vista to Sorrento Mesa</td>
<td>SR 905 to Mira Mesa Blvd</td>
<td>40</td>
<td>39</td>
</tr>
<tr>
<td>9</td>
<td>I-805 Chula Vista to Downtown SD</td>
<td>SR 905 to F St via SR-94</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>10</td>
<td>I-5 San Ysidro to Downtown SD</td>
<td>SR 905 to 6th Ave</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>11</td>
<td>I-8 El Cajon to Sorrento Valley</td>
<td>El Cajon Blvd to Mira Mesa Blvd via I-805</td>
<td>29</td>
<td>31</td>
</tr>
</tbody>
</table>

Source: Freeway Performance Measurement System (PeMS) Version 9.0, the California Department of Transportation (Caltrans)

Notes: (a) The a.m. peak period is based on a departure time of 8:00 a.m., and the p.m. peak period is based on a departure time of 5:00 p.m. (b) The a.m. direction is listed; the p.m. is the reverse direction of travel. (c) Corridor limits are listed for the a.m. direction and are approximately the same for the p.m. direction. (d) Data are reported for commutes on Tuesdays, Wednesdays, and Thursdays.
Map 1
Key Auto Corridor Travel Times, San Diego County, 2011
As shown in Table 3, travel volumes continued to fluctuate in 2011. Observed decreases in travel time and travel volume can potentially be attributed to a variety of factors, including the downturn of the economy and roadway construction efforts during the last several years focused on infrastructure improvements that address“severe congestion levels” - specific bottlenecks that cause an overall slowing of the system.

Table 3
Travel Volumes in Key Auto Corridors, 2005 to 2011

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I-5 Oceanside to Downtown SD</td>
<td>Carmel Valley Rd</td>
<td>108,100</td>
<td>98,100</td>
<td>93,100</td>
<td>93,200</td>
<td>96,600</td>
<td>96,200</td>
<td>98,300</td>
<td>84,800</td>
<td>85,600</td>
<td>84,600</td>
<td>83,100</td>
<td>85,300</td>
<td>86,700</td>
<td>86,000</td>
</tr>
<tr>
<td>2</td>
<td>I-15 Escondido to Downtown SD</td>
<td>Poway Rd</td>
<td>97,000</td>
<td>99,300</td>
<td>114,100</td>
<td>113,500</td>
<td>115,600</td>
<td>108,300</td>
<td>107,800</td>
<td>113,700</td>
<td>114,300</td>
<td>114,600</td>
<td>95,300</td>
<td>106,500</td>
<td>103,800</td>
<td>101,600</td>
</tr>
<tr>
<td>3</td>
<td>SR 78 Escondido to Carlsbad</td>
<td>Barham Rd/Woodland Pkwy</td>
<td>77,300</td>
<td>76,300</td>
<td>75,600</td>
<td>75,700</td>
<td>77,200</td>
<td>76,500</td>
<td>76,400</td>
<td>79,700</td>
<td>79,000</td>
<td>79,200</td>
<td>78,500</td>
<td>79,000</td>
<td>79,600</td>
<td>79,800</td>
</tr>
<tr>
<td>4</td>
<td>SR 94 El Cajon to Downtown SD</td>
<td>Euclid Ave</td>
<td>75,500</td>
<td>81,600</td>
<td>81,000</td>
<td>79,500</td>
<td>79,300</td>
<td>79,800</td>
<td>78,800</td>
<td>77,200</td>
<td>77,600</td>
<td>77,000</td>
<td>76,600</td>
<td>77,300</td>
<td>76,800</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>I-8 El Cajon to Downtown SD</td>
<td>Waring Rd</td>
<td>114,900</td>
<td>115,800</td>
<td>114,700</td>
<td>112,400</td>
<td>112,900</td>
<td>112,800</td>
<td>110,100</td>
<td>117,200</td>
<td>118,000</td>
<td>117,800</td>
<td>114,900</td>
<td>114,400</td>
<td>114,700</td>
<td>110,600</td>
</tr>
<tr>
<td>6</td>
<td>SR 52 Santee to Kearny Mesa</td>
<td>Santo Rd</td>
<td>39,200</td>
<td>39,100</td>
<td>40,600</td>
<td>39,900</td>
<td>38,900</td>
<td>44,800</td>
<td>49,200</td>
<td>39,500</td>
<td>39,300</td>
<td>32,400</td>
<td>33,800</td>
<td>30,700</td>
<td>44,300</td>
<td>48,100</td>
</tr>
<tr>
<td>7</td>
<td>I-805 Mid-City to Sorrento Valley</td>
<td>Governor Dr</td>
<td>104,200</td>
<td>106,600</td>
<td>106,200</td>
<td>103,600</td>
<td>103,300</td>
<td>104,500</td>
<td>104,200</td>
<td>105,300</td>
<td>105,600</td>
<td>104,700</td>
<td>102,600</td>
<td>101,200</td>
<td>102,500</td>
<td>101,800</td>
</tr>
<tr>
<td>8</td>
<td>I-805 Chula Vista to Sorrento Valley</td>
<td>Governor Dr</td>
<td>104,200</td>
<td>106,600</td>
<td>106,200</td>
<td>103,600</td>
<td>103,300</td>
<td>104,500</td>
<td>104,200</td>
<td>105,300</td>
<td>105,600</td>
<td>104,700</td>
<td>102,600</td>
<td>101,200</td>
<td>102,500</td>
<td>101,800</td>
</tr>
<tr>
<td>9</td>
<td>I-805 Chula Vista to Downtown SD</td>
<td>NO SR 54</td>
<td>106,900</td>
<td>107,200</td>
<td>105,400</td>
<td>101,500</td>
<td>102,400</td>
<td>92,900</td>
<td>91,800</td>
<td>103,400</td>
<td>104,100</td>
<td>102,500</td>
<td>101,500</td>
<td>101,700</td>
<td>88,700</td>
<td>88,600</td>
</tr>
<tr>
<td>10</td>
<td>I-5 San Ysidro to Downtown SD</td>
<td>24th St</td>
<td>83,200</td>
<td>87,400</td>
<td>79,200</td>
<td>75,800</td>
<td>76,000</td>
<td>77,500</td>
<td>76,200</td>
<td>89,900</td>
<td>93,900</td>
<td>79,700</td>
<td>73,000</td>
<td>73,800</td>
<td>74,800</td>
<td>73,500</td>
</tr>
<tr>
<td>11</td>
<td>I-8 El Cajon to Sorrento Valley</td>
<td>Waring Rd</td>
<td>114,900</td>
<td>115,800</td>
<td>114,700</td>
<td>112,400</td>
<td>112,900</td>
<td>110,100</td>
<td>110,100</td>
<td>117,200</td>
<td>118,000</td>
<td>117,800</td>
<td>114,900</td>
<td>114,400</td>
<td>114,700</td>
<td>110,600</td>
</tr>
</tbody>
</table>

Source: Freeway Performance Measurement System (PeMS) Version 9.0, Caltrans
Notes: (a) Data are reported for commutes on Tuesdays, Wednesdays, and Thursdays. (b) Traffic data obtained from monitoring stations may be subject to atypical operating conditions due to active highway construction. Volumes for I-805 Mid-City to Sorrento Valley and I-805 Chula Vista to Sorrento Valley are the same as those for Chula Vista to Downtown San Diego because they share the same screenline.

As mentioned above, as the PeMS continues to be developed and refined, it will eventually incorporate real-time transit data. In the meantime, the 2011 RCP Monitoring Report includes transit volume information from FY 2005 through FY 2011 based on SANDAG Passenger Counting Program data. Transit passenger volumes are measured at key locations (screenlines) selected within each corridor. For each corridor, transit passenger volumes are listed by screenline in Table 4. As with vehicle travel volumes, transit travel volumes continued to fluctuate. This may also be due to the economic recession, as well as cutbacks in State and federal funding.
<table>
<thead>
<tr>
<th>Year</th>
<th>Northbound/Eastbound</th>
<th>Southbound/Westbound</th>
<th>Total - Both Directions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>2,752</td>
<td>2,041</td>
<td>4,793</td>
</tr>
<tr>
<td>2006</td>
<td>2,527</td>
<td>2,019</td>
<td>4,546</td>
</tr>
<tr>
<td>2007</td>
<td>2,464</td>
<td>1,933</td>
<td>4,397</td>
</tr>
<tr>
<td>2008</td>
<td>2,411</td>
<td>1,870</td>
<td>4,281</td>
</tr>
<tr>
<td>2009</td>
<td>2,372</td>
<td>1,820</td>
<td>4,192</td>
</tr>
<tr>
<td>2010</td>
<td>2,336</td>
<td>1,772</td>
<td>4,108</td>
</tr>
<tr>
<td>2011</td>
<td>2,302</td>
<td>1,726</td>
<td>4,028</td>
</tr>
</tbody>
</table>

**Note:** The transit screenline locations for individual routes may not represent the peak passenger load locations, and so may understate ridership on that route.

Source: SANDAG Passenger Counting Program 2011

The RCP 2010-2011 Biennial Performance Monitoring Report
Annual Hours of Traffic Delay per Traveler

Annual hours of traffic delay per traveler has decreased since 2005 as shown in Figure 7. However, between 2009 and 2010, it has slightly increased. In the next RCP Monitoring report, we will know if this is a trend or if it stabilized. Delay is defined as the extra travel time it takes travelers to complete a trip during peak periods (6 to 9 a.m. and 4 to 7 p.m.) as a result of congestion.

Figure 7
Annual Hours of Traffic Delay Per Traveler During Peak Periods, 2000 to 2010

Regional Crime Rate

As shown in Figure 8, the rate of crime in the region continues to decline, and in 2010 reached a new low of 25 per 1,000 people.

Figure 8
FBI Index Crimes Per 1,000 People, 2000 to 2010

Source: Annual Urban Mobility Report, Texas Transportation Institute

Source: SANDAG Criminal Justice Research Division.
Conclusion

As of 2011 the region continued to make progress toward achieving some of the urban form and transportation goals listed in the RCP, but not others. It is likely that many of these indicators reflect the continued economic recession’s impact on travel. Future monitoring is required to fully understand our progress toward improving mobility. When examining travel times and volumes in key auto and transit corridors, this indicator suggests that the region is reasonably managing congestion, as freeway travel times and volumes have mostly decreased. Finally, the regional crime rate continues the decrease that started in 2003-2004.
Despite the sharp fall in housing prices associated with the recession, the lack of affordable housing continues to be one of the major issues facing the San Diego region today. Building permit issuance has fallen from nearly 20,000 units in 2003, to just over 5,000 units in 2011. The RCP calls for more housing choices—more apartments, condominiums, and single family homes in all price ranges. How much, what type, and where housing is built are some of the most important decisions the region can make in shaping its future. The Smart Growth Opportunity Areas located on the Smart Growth Concept Map identify approximately 200 sites throughout the region where new housing can be located near jobs and transit—thus providing more housing and transportation choices and better connecting transportation and land use. Implementation of smart growth, by creating more compact, walkable, and bicycle-friendly communities that are accessible to public transit, will help the region meet its greenhouse gas reduction (GHG) emission targets set by the California Air Resources Board (CARB).

In October 2011, SANDAG adopted the 2050 Regional Transportation Plan and Sustainable Communities Strategy (2050 RTP/SCS) and the Regional Housing Needs Assessment Plan for the fifth housing element cycle (2013 – 2020). Both documents, which were prepared concurrently, show that the region has made strides toward ensuring sufficient housing capacity for all income levels between now and 2050. Collectively, the 18 cities and County of San Diego have over 200,000 units of multifamily unit housing capacity planned in the 30 dwelling units per acre category. About 80 percent of the new housing units expected to be built between now and 2050 will be multifamily, with most of them located on infill and redevelopment sites near transit. This trend toward more compact, transit-oriented development will help the region achieve both its housing and GHG reduction targets.

A new challenge faced by the region and its local jurisdictions (along with other areas in the state) is the loss of affordable housing funding related to the elimination of redevelopment agencies, and the minimal amount of funding remaining from the housing bonds approved by the state’s voters in 2002 and 2006. In order to continue building affordable housing at the levels seen during the 2000’s, new sources of funding and new approaches to addressing our affordable housing needs for very low, low, and moderate income households need to be found.

**Housing Opportunity Index**

As shown in Figure 9, data from 2011 continues the mostly upward trend in housing affordability since 2007. The percent of homes sold that are affordable to households earning the regional median income has increased from a low of 5 percent in 2006 to 55 percent in 2011. This change from the first part of the decade is the result of the mortgage lending and foreclosure problems and economic downturn that have affected the region, as well as the nation as a whole.

Despite the increase in affordability during the past six years, housing prices are still out of reach for many households in the region. The median price of all homes (resale houses, resale condominiums, and new houses/condominiums and condominium conversions) dropped at the end of the last decade. Prices went from $495,500 in June 2007 to $370,000 in June 2008 and to $314,250 in June 2009 (DataQuick Information Systems). According to DataQuick, as reported in the San Diego Union-Tribune, the median price of all homes during the current real estate cycle peaked in November 2005 at $517,500 and bottomed out in January 2009 at $280,000. The current median home price is just over five times the regional median household income of $62,771 (SANDAG Current Estimates Program). Historically the median price of a home has been considered to be
affordable at three to four times the median income. Although home prices began rising again to $331,500 in 2010, they recently dipped to $320,000 in 2011.

Figure 9
Housing Opportunity Index, 2000 to 2011

Source: National Association of Home Builders

Percent of Households with Housing Costs Greater Than 35 Percent of Income

During the first half of last decade, the percentage of households paying more than 35 percent of their income toward housing costs was on an upward trend. While this trend did not reverse, it did stabilize beginning in 2006. It remained constant, with 41 percent of households paying more than 35 percent of income for housing costs during 2009 and 2010.

Figure 10
Percent of Households Paying 35 Percent or More of Income for Housing, 2000 to 2010

Source: American Community Survey, 1-Year Estimates. U.S. Census Bureau
Another indicator of lack of housing affordability in the region is the income a household must earn to afford the rent for an apartment at the Department of Housing and Urban Development’s Fair Market Rent of $1,324 for a two-bedroom unit (a slight decrease from $1,418 in 2009). In 2010 that amount was $52,960 annually or about $25 per hour (assuming that no more than 30 percent of income is spent on housing). However, the income needed in the San Diego region is roughly $119 less than for the state ($53,079); the upward trend in annual income needed over the last ten years is fairly consistent for both the state and the region.

In 2010, the minimum wage in California was $8.00 per hour. Therefore, a household must include more than three minimum wage earners working forty hours per week year-round to make a two-bedroom fair market rent affordable in the San Diego region.

**Figure 11**
Annual Income Needed to Afford Fair Market Rent (FMR), 2000 to 2010

![Graph showing annual income needed to afford fair market rent from 2000 to 2010.](source)

**Source:** Out of Reach, National Low-Income Housing Coalition

### Ratio of New Jobs to New Housing Units

In 2008 the California Planning Roundtable published a report entitled, “Deconstructing Jobs-Housing Balance.” This report provides an overview of jobs-housing balance issues for planning practitioners. It outlines the objectives such a policy hopes to achieve (such as reduced driving and congestion, reductions in air pollutants, and lower costs to businesses and commuters, among others) and the strengths and shortcomings of the various ways of measuring this balance. The conclusion of the report is that jobs-housing balance ratios should be used as generalized indicators, and that regional and local policies such as the smart growth, affordable housing, economic prosperity, transit-oriented transportation, congestion pricing, and transportation demand and system management strategies that the region is pursuing through implementation of the RCP and 2050 RTP/SCS, and RHNA will assist in meeting the objectives associated with jobs-housing balance. The variables that make assessing jobs-housing balance difficult include the types of jobs available, job skills and education of residents, availability (or lack thereof) of a range of housing choices that are affordable to a variety of income levels, households with multiple workers, job changes, and quality of schools.

With that perspective in mind, Figure 12 shows the ratio of new jobs created to new housing units built from 2001 to 2010, and Table 5 shows the jobs and housing data and ratios for both total jobs and housing units and new jobs and housing units. The ratio fluctuates between 1.17 and 1.07 based on the total number of jobs and housing units between 2001 and 2010. This ratio is similar to most of the other major metropolitan areas of the state (see California Regional Progress Report, 2007).
As shown in Table 5, over the past few years, growth in the number of new housing units has slowed significantly; growth in the number of new jobs began to slow in 2006. The region experienced net job losses in 2008, 2009, and 2010, although in 2010 the loss is not as substantial as in 2009. The loss of 68,400 jobs in 2009 caused the significant drop in the ratio of new jobs to new units as well as the drop in the ratio of total jobs to total housing units as shown in Figure 12. As the economy recovers in future years, this indicator (and others because of the complicated nature of this issue) may provide a more useful measure of whether the region is achieving a balance between jobs and housing units.

Table 5
Total Jobs Per Housing Unit Ratio, 2001 to 2010

<table>
<thead>
<tr>
<th>Year</th>
<th>Housing Units</th>
<th>Wage &amp; Salary Jobs¹</th>
<th>New Units</th>
<th>New Jobs</th>
<th>New Jobs/New Units</th>
<th>Jobs/Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>1,051,142</td>
<td>1,230,000</td>
<td>10,993</td>
<td>24,300</td>
<td>2.2</td>
<td>1.17</td>
</tr>
<tr>
<td>2002</td>
<td>1,065,802</td>
<td>1,241,800</td>
<td>14,660</td>
<td>11,800</td>
<td>0.8</td>
<td>1.17</td>
</tr>
<tr>
<td>2003</td>
<td>1,080,204</td>
<td>1,251,300</td>
<td>14,402</td>
<td>9,500</td>
<td>0.7</td>
<td>1.16</td>
</tr>
<tr>
<td>2004</td>
<td>1,093,198</td>
<td>1,271,500</td>
<td>12,994</td>
<td>20,200</td>
<td>1.6</td>
<td>1.16</td>
</tr>
<tr>
<td>2005</td>
<td>1,107,985</td>
<td>1,292,800</td>
<td>14,787</td>
<td>21,300</td>
<td>1.4</td>
<td>1.17</td>
</tr>
<tr>
<td>2006</td>
<td>1,118,283</td>
<td>1,312,500</td>
<td>10,298</td>
<td>19,700</td>
<td>1.9</td>
<td>1.17</td>
</tr>
<tr>
<td>2007</td>
<td>1,131,749</td>
<td>1,319,700</td>
<td>13,466</td>
<td>7,200</td>
<td>0.5</td>
<td>1.17</td>
</tr>
<tr>
<td>2008</td>
<td>1,140,654</td>
<td>1,309,300</td>
<td>8,905</td>
<td>-10,400</td>
<td>-1.2</td>
<td>1.15</td>
</tr>
<tr>
<td>2009</td>
<td>1,145,548</td>
<td>1,240,900</td>
<td>4,894</td>
<td>-68,400</td>
<td>-14.0</td>
<td>1.08</td>
</tr>
<tr>
<td>2010</td>
<td>1,149,426</td>
<td>1,229,800</td>
<td>3,878</td>
<td>-11,100</td>
<td>-2.9</td>
<td>1.07</td>
</tr>
</tbody>
</table>

Source: SANDAG Current Estimates Program, California Employment Development Department.

Note: The 2010 Housing Unit estimate in Table 5 was not benchmarked to the 2010 Census. Since this table reflects a series benchmarked from the Census 2000, it is appropriate to use this figure. It does not match the estimate in Table 1.

¹ Does not include military and self-employed

Figure 12
Total New Jobs Per New Housing Unit Ratio, 2001 to 2010

Source: SANDAG Annual Population and Housing Estimates; California Employment Development Department
Share of New Housing Units by Income Category

Fourth Housing Element Cycle (July 1, 2005 – June 30, 2010)

A total of 80,682 building permits for new housing units were issued in the region between January 1, 2003 and December 31, 2010 (six months beyond the 7.5-year Regional Housing Needs Assessment (RHNA) projection period for the fourth housing element cycle), including 4,537 very low income, 4,721 low income, 3,652 moderate income, and 67,772 above moderate income housing units, as shown in Table 6B. Based on the 2003 – 2010 RHNA adopted by SANDAG in February 2005, building permits have been issued for 19 percent of the very low income, 26 percent of the low income, 18 percent of the moderate income, and 152 percent of the above moderate income regional housing needs established for the RHNA projection period.

The data show that the above moderate income housing needs established in the fourth RHNA cycle have been exceeded, while the housing needs for very low, low, and moderate income households fell short of their respective goals. The subsidies needed to build very low and low income housing in the region have proved inadequate to meet the region’s lower income RHNA goals despite the approval of the statewide affordable housing bonds in 2002 (Proposition 46) and 2006 (Proposition 1C) and availability of tax increment housing set-aside funds from redevelopment agencies (which will no longer be available in the future). Few moderate income units were built because of the high costs associated with land and construction materials and the requirement that most of the available financial resources be used to build lower income units. As shown in Figure 13, total building permit issuance dropped off during 2006, 2007, 2008, and 2009, before increasing slightly in 2010, the final year of the fourth housing element cycle. Likewise, construction of above moderate income units slowed during 2007, 2008, and 2009, and increased in 2010. Lower income units (very low and low) had the most variable changes in new building permit issuance, experiencing a decline in one year and an increase the following year. However, as Figure 13 illustrates, more housing units were permitted for lower income households (very low and low) than for moderate income households from 2003-2011.

Overall, the region met 75 percent of its RHNA housing goal of 107,301 units during the eight year period (six months beyond the seven and a half years of the RHNA projection period).

Figure 13
Total Housing Units Permitted in the San Diego Region by Income Category, 2003-2011

Source: Data compiled from building permits issued by the local jurisdictions in the San Diego region based on Annual Housing Element Progress Reports submitted to the California Department of Housing and Community Development and information provided to SANDAG by individual jurisdictions.
Table 6A
Share of New Housing Units by Income Category, January 1, 2003 through December 31, 2010

<table>
<thead>
<tr>
<th>Income Level</th>
<th>Very Low</th>
<th>Low</th>
<th>Moderate</th>
<th>Above Moderate</th>
<th>Total for all Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Housing Units Permitted</td>
<td>4,537</td>
<td>4,721</td>
<td>3,652</td>
<td>67,772</td>
<td>80,682</td>
</tr>
<tr>
<td>RHNA Goal (4th Cycle)</td>
<td>24,143</td>
<td>18,348</td>
<td>20,280</td>
<td>44,530</td>
<td>107,301</td>
</tr>
<tr>
<td>Percent of Goal Produced</td>
<td>19%</td>
<td>26%</td>
<td>18%</td>
<td>152%</td>
<td>75%</td>
</tr>
<tr>
<td>Units Left to Permit</td>
<td>19,606</td>
<td>13,627</td>
<td>16,628</td>
<td>-23,242</td>
<td>26,619</td>
</tr>
</tbody>
</table>

Source: Data compiled from building permits issued by the local jurisdictions in the San Diego region. Permitted units include deed-restricted and non-deed-restricted units as reported by each jurisdiction.

Fifth Housing Element Cycle (January 1, 2013 – December 31, 2020)

A total of 9,643 building permits for new housing units were issued in the region between January 1, 2010 – December 31, 2011 (two years out of the 11-year RHNA projection period for the fifth housing element cycle), including 1,036 very low income, 971 low income, 478 moderate income, and 7,158 above moderate income housing units, as shown in Table 6B.

Based on the 2010 – 2020 Regional Housing Needs Assessment (RHNA) Plan adopted by the SANDAG Board of Directors in October 2011, the region has achieved 3 percent of the very low income, 4 percent of the low income, 2 percent of the moderate income, and 11 percent of the above moderate income regional housing needs established for the RHNA projection period. Because the data collected through December 31, 2011 reflects the first two years of an 11-year RHNA cycle, the percentages of the units produced for very low, low, moderate, and above moderate income households are fairly low. The data show that satisfactory progress is being made in the above moderate income housing category, while nominal progress has been made in meeting the housing needs for very low, low, and moderate income households within the first two years of the 11-year RHNA projection period.

As shown in Figure 13, total building permit issuance increased from 2010 to 2011, but dropped slightly for very low income households, dropped significantly for low income households, and increased for moderate and above moderate income households. (Note: The data in Tables 6A and 6B overlap by one year – from January 1, 2010, to December 31, 2010).

Table 6B
Share of New Housing Units by Income Category, January 1, 2010 through December 31, 2011

<table>
<thead>
<tr>
<th>Income Level</th>
<th>Very Low</th>
<th>Low</th>
<th>Moderate</th>
<th>Above Moderate</th>
<th>Total for all Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Housing Units Permitted</td>
<td>1,036</td>
<td>971</td>
<td>478</td>
<td>7,158</td>
<td>9,643</td>
</tr>
<tr>
<td>RHNA Goal (5th Cycle)</td>
<td>36,450</td>
<td>27,700</td>
<td>30,610</td>
<td>67,220</td>
<td>161,980</td>
</tr>
<tr>
<td>Percent of Goal Produced</td>
<td>3%</td>
<td>4%</td>
<td>2%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Units Left to Permit</td>
<td>35,414</td>
<td>26,729</td>
<td>30,132</td>
<td>60,062</td>
<td>152,337</td>
</tr>
</tbody>
</table>

Source: Data compiled from building permits issued by the local jurisdictions in the San Diego region. Permitted units include deed-restricted and non-deed-restricted units as reported by each jurisdiction.
Vacancy Rates

Vacancy rates remained stable between 2000 and 2008, but increased between 2008 (4.5%) and 2010 (6.7%), as shown in Figure 14. This increase is likely related to the increase in foreclosures in recent years.

Figure 14
Vacancy Rates, 2000 to 2010

Source: American Community Survey, 1-Year Estimates. U.S. Census Bureau

Percent of Households Living in Overcrowded Conditions

As shown in Figure 15, the percentage of households living in overcrowded conditions in the region remained relatively stable between 2005 and 2010. The Census definition of overcrowded is more than one person per room.

Figure 15
Overcrowding in the Region, 2000 to 2010

Source: American Community Survey, 1-Year Estimates. U.S. Census Bureau
Number of Households on the Waiting List for Section 8 Vouchers

In 2011, collectively the region had approximately 92,615 households on Section 8 waiting lists. Although in 2007 and 2008 the waiting lists included 65,600 and 49,700 households respectively, the shorter waiting list in 2008 was likely the result of the periodic purging of the lists undertaken by the Section 8 jurisdictions. Only six jurisdictions in the San Diego region issue Section 8 vouchers: Carlsbad, Encinitas, National City, Oceanside, the City of San Diego, and the County of San Diego.

Conclusion

Housing affordability continues to be a significant issue in the San Diego region, although the above data indicate that the rapid decline in affordability (i.e., increase in housing costs) has slowed for the time being. Much of this change has been due to the decline in housing prices resulting from the large number of foreclosures and the economic downturn experienced both in the region and nationwide. Although building permits for above moderate income (market rate) homes has exceeded the RHNA goals, the region’s ability to produce housing for very low, low, and moderate income households is and will likely continue to be challenging. With the expenditure of state housing bond money (Propositions 46 and 1C) almost complete, and the generally accepted need for financial subsidies and/or regulatory measures to construct very low and low income unit, the region will need to consider new ways to provide housing for families and individuals whose incomes fall into these categories. The need to look at ways to increase the construction of moderate income housing also needs to be explored.
To ensure a healthy environment, the region must protect its key open spaces and sensitive habitat areas, ensure that the air and water are clean, and restore the eroding beaches. Viable natural habitats, water quality, a well-managed shoreline, and air quality are critical components to the health and well-being of residents as well as to the overall economic prosperity of the region.

**Habitat Conserved Within Designated Preserve Areas**

The region is engaging in the implementation or development of four subregional habitat conservation plans: the Multiple Species Conservation Program (MSCP) Plan South, finalized in 1998; the Multiple Habitat Conservation Program (MHCP), finalized in 2003; the North County Plan, with public review anticipated in Spring 2013 and completion in 2014; and the East County Plan, delayed until further notice as a result of budget and staffing constraints. Map 2 shows the location and boundaries of these plans.

Map 2
**San Diego Region Habitat Conservation Planning Areas**

Six jurisdictions, including a portion of the unincorporated area of the County, have approved habitat conservation plans and signed implementing agreements (covering 20 percent of the region). Seven jurisdictions are working on approval of their implementing agreements (covering 73 percent of the region), and seven jurisdictions are not pursuing implementing agreements due to limited habitat in their jurisdictions (covering 1 percent of the region). The remaining area (covering 6 percent of the region) consists of military lands which have their own integrated natural resource management plans.

As part of SANDAG participation in regional habitat conservation planning, a conserved lands database was developed in 2010 to track the conservation and management of land in San Diego County. This database, available to the public, will be maintained and serve as the basis for RCP monitoring for habitat conservation.
Of the total land in jurisdictions that have approved conservation plans and signed implementing agreements, 81 percent of land has been conserved within the habitat preserve system, as shown in Figure 16. This includes lands preserved to date within the MSCP South and the MHCP.

Additional acreage has been obligated by the City and County of San Diego under approved discretionary development entitlements or conservation banks, but has not yet been conserved through formal legal mechanisms (e.g., easement, dedication in fee title to jurisdictions). This acreage will be added to the conserved lands database when they are legally conserved.

**Figure 16**
MSCP South County and MHCP Land Conservation by Year, 1997 to 2011 with 2020 and 2030 Targets

The SANDAG Environmental Mitigation Program (EMP), funded through TransNet, aims to protect, preserve and restore native habitats as offsets to disturbance caused by construction of regional and local transportation projects. Since 2008, more than 2,376 acres of open space, much of it previously slated for development, have been acquired under the EMP. In 2010 and 2011, SANDAG acquired eight habitat conservation properties totaling 1,289 acres through the TransNet EMP. These projects include Tabata (23.7 acres acquired in 2010), Zamudio (32.5 acres acquired in 2010), Mendocino (19.7 acres acquired in 2010), Vessels (162 acres acquired in 2010), Jeffries Ranch (80.3 acres acquired in 2011), Rincon (37.3 acres acquired in 2011), Deer Canyon (31.4 acres acquired in 2011), and Rancho Lilac (902 acres acquired in 2011).

One successful project example of the TransNet EMP is the Rancho Lilac property acquired in October 2011, as part of the expansion of State Route 76. SANDAG authorized the purchase of the 902-acre Rancho Lilac property in Valley Center for $16.5 million, the largest single property acquired through the TransNet EMP (the property is almost nine times the size of the San Diego Zoo). The Rancho Lilac property is considered both culturally and biologically unique and is home to multiple rare and endangered species. It is also the last component to completing the environmental mitigation for the expansion of SR 76. In addition, acquisitions and regional coordination through the EMP have successfully fulfilled the regional vision of creating extensive wildlife corridors in and around the San Luis Rey River. The California Department of Transportation (Caltrans) negotiated the purchase and is responsible for building on SR 76.
Percent of Preserve Area Actively Maintained

Once conserved, the owner of the property is responsible for the maintenance of the area to retain its habitat conservation values. Based upon the estimates of land conserved in the region described in the previous section, over 1.26 million acres in the region are managed as open space with dedicated land managers. This includes land in North and East County MSCP that are federal, state, and locally owned and conserved for open space and habitat (e.g. State Parks, U.S. Forest Service Lands, Bureau of Land Management areas).

Figure 17
Land Management by Source, 2011

<table>
<thead>
<tr>
<th>Ownership</th>
<th>Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>477,515</td>
</tr>
<tr>
<td>State</td>
<td>613,125</td>
</tr>
<tr>
<td>Local</td>
<td>107,702</td>
</tr>
<tr>
<td>Private</td>
<td>37,439</td>
</tr>
<tr>
<td>Nonprofit</td>
<td>27,213</td>
</tr>
</tbody>
</table>

Source: SANDAG Conserved Land Database 2011

Implementation of RCP Strategic Initiatives

A number of strategic initiatives relating to regional habitat management were identified in Chapter 9 of the RCP. The following provides information on the progress to date.

- **Develop regional habitat funding program**
  The SANDAG Board of Directors established The Quality of Life Ad Hoc Steering Committee in June 2008 to provide policy direction and guide collaborative efforts to collaborate with regional stakeholders on possible approaches to a regional Quality of Life Funding Strategy. A regional funding program for habitat conservation is one of the funding elements being discussed.

- **Develop and implement regional habitat management and monitoring plan**
  The SANDAG Board of Directors approved funding for the coordination of regional management and monitoring efforts. A group of contractors was hired to assist the local jurisdictions, land managers, and wildlife agencies with the development of standardized habitat management and monitoring plans that are efficient and cost-effective.

- **Coordinate regional habitat monitoring databases**
  Currently there are four regional databases for management and monitoring efforts located at the federal, state, and local levels. The focus of the regional management and monitoring team for FY 2011 was to assist the database managers to make these independent databases be able to share data and collaborate of future data gathering efforts. This centralize database will be completed in September 2012.
Prepare guidelines for protecting natural habitats in urbanized areas, and for use of native vegetation in urban landscapes

The various jurisdictions are working on implementing or adopting habitat conservation plans for the natural habitats in urbanized and un-urbanized areas. The various subregional habitat conservation plans illustrated in Map 2 provide the umbrella guidelines for conservation. Included in these jurisdictional plans are provisions for use of native and prohibition of invasive species in urban areas adjacent to open space areas. SANDAG is working with San Diego State University to develop standard guidelines for all land managers to follow in the creation of their natural resource management plans.

Coordinate the planning of future transportation and wildlife corridors

Caltrans has been partnering with SANDAG, U.S. Fish and Wildlife Service and the California Department of Fish and Game on the development of wildlife movement structures under new transportation infrastructure projects, such as SR 76. In addition, SANDAG is engaged in a multi-stakeholder effort to identify critical linkages for the connectivity of wildlife linkages and to initiate regional monitoring of these areas.

Number of Beach-Mile Day Closures

Beginning with the 2011 report, Beach-Mile Days (BMDs) is the new way to measure beach closures. This measure was changed from the previous “weather-adjusted beach mile closure days” because the San Diego County Annual Beach Closure and Advisory Report is no longer available.

BMD is a standardized measure indicating the scale of a beach closure. The California Environmental Protection Agency reports this measure through their Beach Watch Database. It is the product of the number of days a beach was closed and the length of impacted coastline (in miles). For example, if a particular beach was closed for three days and for a distance of 150 yards, the number of BMDs for this incident would be 0.26 (150 yards / 1 mile X 3 days). BMD is a useful measure for annual comparisons of beach health. The Beach closures shown in Figure 18 are caused by water contamination by pathogens. Pathogens can potentially endanger beachgoers when they are exposed to the contaminated water through skin contact (swimming or surfing) or ingestion. Runoff during storms can contribute to contamination; thus, years with a lot of rain may have a higher BMD.

As shown in Figure 18, the BMD has steadily decreased since 2006 when it was 398 for the County. The BMD was 313 in 2007, 288 in 2008, 211 in 2009, and 208 in 2010.

Figure 18
Beach Mile Closure Days, 2001 to 2010

Source: California Environmental Protection Agency: Beach Watch Database.
Beach Widths

Between 2009 and 2010, shoreline retreat and shorezone volume losses occurred at most of the beaches in the Oceanside and Silver Strand Littoral Cells. These losses likely are due to the relatively severe wave conditions that prevailed during the 2009-2010 winter season. However, substantial shoreline advance and shorezone volume gains predominated in the Mission Beach Littoral Cell. These gains appear to be attributable to the 450,000 cu yd of nourishment material placed at Mission Beach by the U.S. Army Corps of Engineers. These changes produced beach widths that exceeded the 2010 target widths by a large margin in the Mission Beach Littoral Cell. In contrast, beach widths at the Oceanside Littoral Cell sites remained below their 2010 target widths (Table 7). Building upon the success of the Regional Beach Sand Project (RBSP) in 2001, SANDAG is embarking on a second RBSP, scheduled for summer 2012. Through this project, SANDAG will continue the process of restoring the region’s eroded beaches by implementing proactive measures to protect and enhance the quality of our coastline.

Table 7
Beach Widths and Targets of Shoreline Segments San Diego Region (in feet), 2000 to 2010

<table>
<thead>
<tr>
<th>Fall Averages</th>
<th>1998</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Imperial Beach</td>
<td>300.0</td>
<td>218.0</td>
<td>218.0</td>
<td>308.0</td>
<td>218.0</td>
<td>217.0</td>
<td>221.0</td>
<td>229.0</td>
<td>307.0</td>
<td>234.0</td>
<td>242.0</td>
<td>229.0</td>
<td>217.0</td>
<td>238.0</td>
</tr>
<tr>
<td>Silver Strand Beach</td>
<td>427.0</td>
<td>461.0</td>
<td>448.0</td>
<td>154.5</td>
<td>451.0</td>
<td>449.0</td>
<td>434.5</td>
<td>438.5</td>
<td>486.0</td>
<td>453.5</td>
<td>458.5</td>
<td>462.0</td>
<td>427.0</td>
<td>210.0</td>
</tr>
<tr>
<td>Coronado</td>
<td>759.0</td>
<td>759.0</td>
<td>767.0</td>
<td>784.0</td>
<td>767.0</td>
<td>768.0</td>
<td>764.0</td>
<td>737.0</td>
<td>790.0</td>
<td>784.0</td>
<td>767.0</td>
<td>766.0</td>
<td>736.0</td>
<td>232.0</td>
</tr>
<tr>
<td>Ocean Beach</td>
<td>278.0</td>
<td>282.0</td>
<td>274.0</td>
<td>283.0</td>
<td>295.0</td>
<td>259.0</td>
<td>264.0</td>
<td>260.0</td>
<td>305.0</td>
<td>284.0</td>
<td>270.0</td>
<td>307.0</td>
<td>266.0</td>
<td>220.0</td>
</tr>
<tr>
<td>Pacific/Mission Beaches</td>
<td>238.5</td>
<td>273.0</td>
<td>286.0</td>
<td>277.7</td>
<td>279.3</td>
<td>282.3</td>
<td>283.7</td>
<td>250.3</td>
<td>301.7</td>
<td>254.0</td>
<td>275.3</td>
<td>276.0</td>
<td>350.3</td>
<td>200.0</td>
</tr>
<tr>
<td>La Jolla</td>
<td>182.0</td>
<td>141.0</td>
<td>192.0</td>
<td>213.0</td>
<td>183.0</td>
<td>229.0</td>
<td>219.0</td>
<td>224.0</td>
<td>223.0</td>
<td>183.0</td>
<td>201.0</td>
<td>200.0</td>
<td>210.0</td>
<td>228.0</td>
</tr>
<tr>
<td>San Diego</td>
<td>184.3</td>
<td>183.0</td>
<td>215.0</td>
<td>252.5</td>
<td>240.5</td>
<td>212.5</td>
<td>209.0</td>
<td>208.3</td>
<td>224.8</td>
<td>175.0</td>
<td>204.5</td>
<td>202.5</td>
<td>173.3</td>
<td>232.0</td>
</tr>
<tr>
<td>Del Mar</td>
<td>185.5</td>
<td>227.0</td>
<td>166.0</td>
<td>133.3</td>
<td>167.3</td>
<td>157.3</td>
<td>120.7</td>
<td>102.3</td>
<td>158.0</td>
<td>106.0</td>
<td>125.5</td>
<td>118.5</td>
<td>102.5</td>
<td>228.0</td>
</tr>
<tr>
<td>Solana Beach</td>
<td>134.0</td>
<td>123.0</td>
<td>108.0</td>
<td>171.0</td>
<td>141.0</td>
<td>138.0</td>
<td>133.0</td>
<td>130.0</td>
<td>157.0</td>
<td>113.0</td>
<td>155.0</td>
<td>157.0</td>
<td>163.0</td>
<td>232.0</td>
</tr>
<tr>
<td>Encinitas</td>
<td>157.5</td>
<td>137.3</td>
<td>152.3</td>
<td>183.0</td>
<td>177.3</td>
<td>181.3</td>
<td>175.0</td>
<td>150.3</td>
<td>201.8</td>
<td>140.8</td>
<td>167.2</td>
<td>169.7</td>
<td>157.2</td>
<td>240.0</td>
</tr>
<tr>
<td>Carlsbad</td>
<td>161.3</td>
<td>171.5</td>
<td>182.8</td>
<td>190.4</td>
<td>210.2</td>
<td>212.8</td>
<td>189.4</td>
<td>177.2</td>
<td>205.8</td>
<td>178.4</td>
<td>193.2</td>
<td>191.0</td>
<td>180.6</td>
<td>216.0</td>
</tr>
<tr>
<td>Oceanside</td>
<td>283.0</td>
<td>278.3</td>
<td>287.3</td>
<td>287.0</td>
<td>294.7</td>
<td>302.7</td>
<td>265.0</td>
<td>277.7</td>
<td>300.7</td>
<td>248.0</td>
<td>230.0</td>
<td>249.0</td>
<td>216.7</td>
<td>232.0</td>
</tr>
</tbody>
</table>

Source: SANDAG Regional Beach Monitoring Program, Annual Report 2010

Note: The SANDAG Regional Beach Sand Project nourished 12 of the region’s beaches in 2001.

Impaired Waterbodies

Data for this indicator are published every four years. Between 2006 and 2010, impaired waterbodies in the region decreased. Impaired waterbodies are those that do not meet Clean Water Act standards. This list is prepared every four years by the San Diego Regional Water Quality Control Board.

As noted in 2009, the region as a whole greatly enhanced its monitoring efforts between 2002 and 2006; as such, a greater percentage of waterbodies were found to be impaired in 2006 than in 2002. Thus, the extent to which the region’s impaired waterbodies has increased between 2002 and 2006 cannot be conclusively determined. Similarly, between 2006 and 2010 more information has been made available from the Water Board and outside agencies that makes comparisons among the years difficult due to changing data collection.
methodologies. Overall, the new policies in place for the listing and de-listing of impaired water bodies reflects an increase in the amount and better organized water quality data available for consideration.

Figure 19
Impaired Waterbodies, 2002, 2006, and 2010

Source: San Diego Regional Water Quality Control Board

Air Quality

The Air Quality Index (AQI) data suggest that air quality largely continues to improve in the San Diego region as compared to 1999. Air quality appeared to have been at its cleanest in 2011, with the lowest number of days during which air quality was considered unhealthy since 1999. The increases in 2006 and 2008 were likely due to a number of days during which the region experienced record-high temperatures.

The AQI can be used to report daily air quality. It tells us how clean or polluted the air is and what associated health effects might be of concern. The United States Environmental Protection Agency (EPA) calculates the AQI for five major pollutants regulated by the Clean Air Act: ground-level ozone, particle pollution (also known as particulate matter), carbon monoxide, sulfur dioxide, and nitrogen dioxide. For each of these pollutants, the EPA has established national air quality standards to protect public health. In the San Diego region, ground-level ozone and particulate matter pollutant levels are responsible for the majority of days during which the region experiences an AQI over 100.

An AQI value of 100 generally corresponds to the national air quality standard for the pollutant, which is the level the EPA has set to protect public health. AQI values below 100 are generally thought of as satisfactory. When AQI values are above 100, air quality is considered to be unhealthy - first for certain sensitive groups of people, then for everyone as AQI values rise. Sensitive groups are defined as those “at greater risk than the general population from the toxic effects of a specific air pollutant,” such as older adults, children, or those with heart or lung disease.

The AQI data presented in this report reflect EPA revised standards for PM$_{2.5}$ (fine particles). The EPA enacted a stricter standard for PM$_{2.5}$ in 2006. The data shown report on performance relative to the revised standard from 1999 to 2010. It also should be noted that the data exclude days during the 2003 and 2007 wildfires when PM$_{2.5}$ and carbon monoxide exceeded their respective standards.
Conclusion

The region continues to make progress on habitat conservation, and further progress is anticipated as the North and East County MSCPs are adopted. As of 2008 the region has been experiencing a consistent improvement in its results with regard to water quality. The number of beach mile closure days continued to decrease and is at its lowest since 2005. Beach widths decreased at most beaches, but should increase in the next reporting period with the SANDAG Regional Beach Sand Project. With respect to air quality, 2011 had the fewest number of unhealthy days since 1999. SANDAG continues to evaluate strategies to fund improvements to water quality, habitat preservation, and beach nourishment.
Economic prosperity is an important area of focus for tracking the region’s performance. A well-educated workforce, growth in industry clusters, and high-wage along with balanced-wage jobs are all important indicators to measure the progress of the region’s economy. Additionally, focusing resources on human and physical infrastructure, job growth, and a rising standard of living are important factors that work symbiotically to improve San Diego’s quality of life.

**Economic Prosperity Factors that Improve the Region’s Quality of Life**

Economic prosperity indicators were developed for the RCP Annual Performance Monitoring Report to track past performance and to anticipate future areas of strategic initiatives. These indicators are tracked in the following areas:

- Labor Force Education Attainment
- Employment Growth in High Wage Industry Clusters
- Regional Unemployment Rate Compared to California and the United States
- Real per Capita Income Compared to California and the United States
- Regional Poverty Rate Compared to California and the United States

As a component of the RCP implementation, the Regional Economic Prosperity Strategy (REPS) was originally developed in 1998 in response to the economic restructuring and recession of the early 1990s. The REPS was updated in 2008 and identifies demographic and economic challenges facing the San Diego region, and promotes a strategy to meet these challenges and improve the competitiveness of our local economy. The outcome of the REPS identified strategic goals and recommended actions that call for infrastructure investment and public policy support in order to strengthen the region’s economic foundation.

Another important component of the RCP implementation includes measuring employment growth in the region’s traded industry clusters. The clusters were introduced locally in 1994 as a tool to aid in the economic recovery by identifying several employment clusters that would serve as the foundation for regional recovery and growth. Since 1998, three cluster reports have been completed and SANDAG is currently finalizing its fourth cluster study.
Labor Force Educational Attainment

Labor Force education attainment is an important measure of the region’s educational progress and standard of living. Overall, the San Diego region has a well-educated labor force. As shown in Figure 21, labor force educational attainment remained stable since 2005. The one exception, however, was a slight decrease in the percentage of the labor force with only a high school degree since 2007.

Figure 21
Labor Force Educational Attainment, 2005 to 2010

Source: American Community Survey, 1-Year. U.S. Census Bureau

Employment Growth in High-Wage Economic Clusters

Economic clusters are groups of interrelated, export-oriented industries that are responsible for bringing new money into the region. Industries within a cluster have business transactions with one another, and thus are interdependent. Cluster companies often participate in local industry associations, which foster collaboration and the exchange of knowledge. Companies within a cluster also compete with each other for market share, which drives innovation and productivity. Companies within clusters tend to be among the region’s leaders in research and development funding, patent awards, and other key indicators of innovation. Many of the clusters also pay high wages, although some do not. All clusters are economic drivers for the region because they are export-oriented.

Measuring employment growth in traded industry clusters is an important indicator of economic prosperity because it shows how the region’s economy grows and changes over time. Clusters help drive economic growth because they bring new money into the region by selling their products and services nationally and internationally.

SANDAG is currently updating the traded industry cluster definitions to reflect changes in the economy since the last study was completed in 2006. According to the draft report, Traded Industry Clusters in the San Diego Region, 2011, the following thirteen clusters drive the regional economy:

- Action Sports Manufacturing
- Advanced Precision Manufacturing
- Aerospace, Navigation, and Maritime Technology
- Apparel Manufacturing.
- Biomedical Devices and Products
- Biotechnology and Pharmaceuticals
Out of these thirteen traded industry clusters, eight clusters were considered “high wage traded industry clusters” and showed wages that are greater than the region’s annual average wage across all industries. As shown in Figure 22, employment in high-wage economic clusters increased in 2010.

However, it should be noted that the clusters were re-defined in the most recent Traded Industry Clusters in the San Diego Region study. Increases in jobs may be the result of both employment growth in the region’s specialized clusters as well as cluster definition changes. For example, the Biomedical Devices and Products and Biotechnology and Pharmaceuticals clusters have been stable clusters throughout the 2000s, contributing to employment growth in 2002, 2003, 2005, and 2010, as shown below in Table 22. Other clusters have decreased in size and are no longer counted as clusters. For example, Financial Services and Design Services were counted as clusters in 2002, 2003, and 2005, but decreased in employment size over time and were no longer counted in cluster employment in 2010. Similarly, other clusters have evolved over time. With the growth of microbrewing in San Diego, the specialty foods cluster has expanded to become Specialty Foods and Microbreweries. New clusters in 2010 include Advanced Precision Manufacturing and Apparel Manufacturing.

**Figure 22**


<table>
<thead>
<tr>
<th>Year</th>
<th>Jobs in High-Wage Clusters</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>164,158</td>
</tr>
<tr>
<td>2003</td>
<td>162,388</td>
</tr>
<tr>
<td>2005</td>
<td>168,164</td>
</tr>
<tr>
<td>2010</td>
<td>189,853</td>
</tr>
</tbody>
</table>

Source: SANDAG Cluster Inventory, Traded Industry Clusters in the San Diego Region, 2011 (SANDAG)

These eight high wage clusters in the San Diego region include:

- Action Sports Manufacturing
- Advanced Precision Manufacturing
- Aerospace, Navigation, and Maritime Technology
- Biomedical Devices and Products
- Biotechnology and Pharmaceuticals
- Cleantech
- ICT
- Publishing and Marketing
Employment growth in high wage clusters therefore has a dual benefit to the region such as economic growth that brings in new money into the region and growth of jobs for local residents. These characteristics fit in with the RCP’s goals of improving local business environment and providing a rising standard of living to the region’s residents.

It should be noted that the revised cluster definitions are currently in draft form, but are anticipated to be finalized by the end of the year.

**Regional Unemployment Rate Compared to California and the United States**

San Diego’s unemployment rate was stable around 5 percent between 2000 and 2007 and was lower than the state and the nation, as shown in Figure 23. Between 2007 and 2009, the region’s unemployment rate began to rise, peaking in 2010. This mirrors state and national trends during the recession. However, the unemployment rate in the San Diego region, California, and the United States has decreased slightly since 2010. This is partially attributed to the recent improvement in the economy. The region’s unemployment rate was 9.9 percent in 2011; it was lower than the state’s rate (11.7%) and greater than the country’s (8.9%) for the third year in a row. The San Diego economy, and specifically the local construction industry, was hit harder than the nation as a whole because of the recession’s impact on our local building industry. Between 2006 and 2010, about 35,000 jobs were lost in the construction industry in the region (California Employment Development Department, QCEW, 2006-2010).

*Figure 23*

Unemployment in San Diego, California and the United States, 2000 to 2011

Source: California Employment Development Department; U.S. Department of Labor, Bureau of Labor Statistics
Real Per Capita Income Compared to California and the United States

Real per capita income is a good measure of the region’s standard of living. As shown in Figure 24, San Diego’s real per capita income has risen between 2003 and 2007. Since 2007, it dropped slightly. Real per capita income was $45,714 in 2009 and remains above that of California and the United States.

Figure 24
Real Per Capita Income in San Diego, California and the United States in Inflation-Adjusted 2009 Dollars, 2001 to 2009

Source: U.S. Bureau of Economic Analysis

Regional Poverty Rate Compared to California and the United States

The San Diego region’s poverty rate has historically been lower than the state and the nation, as shown in Figure 25. However, the region’s poverty rate has increased since 2007, with trends similar to the state and the nation. In 2010, the poverty rate is just under 15 percent, which is slightly lower than California and the United States. Again, as with other indicators, this increase is attributable to the current economic recession.

Figure 25
Percent of Residents Living in Poverty in San Diego, California and the United States, 2000 to 2010

Source: American Community Survey, 1-Year. U.S. Census Bureau
Conclusion

Economic prosperity for the region shows both positive and negative performance. The region continues to have a well-educated labor force. Many of the traded industry clusters in the region continue to grow and provide a variety of balanced and high wage jobs for residents. The region experienced a relatively consistent standard of living between 2003 and 2007, as measured by real per capita income and a drop in the standard of living since 2007. Data from recent indicators, such as poverty and unemployment, show how the economic downturn has affected our region. These indicators show that San Diego is not as bad off economically as the state as a whole. However, the drop in the unemployment rate indicates that the economy may be recovering slightly. The REPS contains strategic goals and recommended actions to help improve the condition of the local economy. It calls for infrastructure investment and public policy support to strengthen the region’s economic foundation and make it more competitive. Additionally, the Traded Industry Clusters in the San Diego Region, 2011 study is being updated to determine drivers of the regional economy and measure how they are changing. These efforts will help to ensure that the region reinforces its status as one of the most desirable places to work and live. Future monitoring reports will measure the success of these strategies.
Public Facilities

Our region requires reliable supplies of water and energy, opportunities to reuse and recycle materials, and sufficient disposal options for waste. The region also needs to make more efficient use of its resources. The Regional Energy Strategy (RES), originally adopted in 1994 and updated in 2003, was again updated in 2009. It serves as an energy policy guide to support decision-making by SANDAG and its member agencies. The RES identifies region-specific energy issues such as increasing the diversity of energy supply in the region. The 2011 RCP Monitoring Report reflects new indicators and targets included in the updated RES.

Water Consumption

As shown in Figure 26, water consumption fluctuated over the last decade, but has declined from 2007 to 2010. The continued decline in water consumption could potentially be attributed to efforts by the San Diego County Water Authority (Water Authority) and local jurisdictions to increase public awareness regarding water issues and the need for water conservation in light of the ongoing drought.

Figure 26
Water Consumption, 2000 to 2010

![Water Consumption Graph](image)

Source: San Diego County Water Authority Annual Reports (fiscal year water supply by source)

Diversity of Water Supply

The diversity of the region’s water supply has been increasing. Reliance on the Metropolitan Water District of Southern California as a source has decreased from 85 percent in 2003 to 44 percent in 2011. Efforts undertaken by the Water Authority several years ago have begun to yield benefits in terms of diversity in the region’s water resource portfolio. The shares of conserved water, recycled water, and local surface water as components of the Water Authority’s diversification strategy have increased and are close to meeting their 2020 targets.
Recycled Water Use

As indicated in previous reports, the amount of recycled water use continues to increase as the region continues to invest in infrastructure and consumer awareness, as shown in Figure 28. Recycled water use has steadily increased since 2006 and stabilized in 2009 and 2010. In 2010 the region had a slight decline to 25,592 acre-feet of recycled water used. The slight decline may be due to the decrease in water consumption overall, see the Water Consumption indicator above. The increase in previous years may be due to larger recycled water facilities that have begun serving customers in the region. In addition, agencies have been providing recycled water retrofit assistance to existing customers in order to expedite hook-ups to their recycled water systems.
Energy Supply and Use

Energy supply describes the resources that make up the total electricity produced for the San Diego Gas & Electric (SDG&E) service area, of which 91 percent is attributed to San Diego County. The energy supply is a mix of both imported and in-region power. Sixty percent of the region’s overall power comes from natural gas. The region’s use of coal continues to decrease, since California no longer permits in-state coal plants and long-term out-of-state contracts continue to expire. Figure 29 shows the breakdown of energy sources used in 2000 and 2010.

Figure 29
Energy Sources for the San Diego Region, 2000 and 2010

| Source: San Diego Gas & Electric Power Content Label. |
Share and Types of Energy produced from Renewable Resources

As of 2010, 11 percent of the region's electricity came from renewable resources, while state and regional targets called for 20 percent as shown in Figure 30. In 2009, the SANDAG Board of Directors approved the Regional Energy Strategy (RES), which updated the region’s energy goals and targets. One of the RES goals is to support development of renewable energy resources to meet or exceed a 33 percent renewable portfolio standard (RPS) by 2020. Figure 31 shows the different types of renewable energy resources that were used in the San Diego region in 2010.

Figure 30
Share of Energy Produced from Renewable Resources

Figure 31
Breakdown of Renewable Energy Resources for 2010

Source: San Diego Gas & Electric Power Content Label.

*Under California law, rooftop solar energy systems are not counted toward the RPS requirements. The RES includes a separate clean distributed generation goal that sets targets for rooftop solar and other kinds of onsite energy systems.
Per Capita Peak Demand for Electricity

The region’s annual per capita electricity peak demand has slowly increased since 2001, as shown in Figure 32 below. The RES calls for cost effective steps and incentives to utilize demand response and energy efficiency measures to reduce overall peak demand.

Figure 32
San Diego Annual Per Capita Electricity Peak Demand, 2000 to 2010

Electricity Consumption by Sector

Electricity and natural gas consumption by sector were added as performance measures in the 2009 update of the RES. The change in this indicator assists SANDAG in tracking the RES goals of reaching energy efficiency and conservation targets, implementing cost-effective steps to reduce peak demand, and increasing the total amount of renewable and nonrenewable energy resources to diversify electricity supply. Residential and commercial sectors use the most electricity in the region. Figure 33 shows the total annual consumption of electricity by sector and is used to track the RES energy efficiency goal to reduce per capita electricity consumption in the residential and commercial sectors by 20 percent by 2030, in order to keep total electricity consumption flat between now and 2030.

Source: California Energy Commission; California Department of Finance Population Estimates
Natural Gas Consumption by Sector

Natural gas supplies more than half of the fuel to generate electricity for the San Diego region. Natural gas is the most environmentally benign fossil fuel; it is used for cooking, to heat and cool homes, and for industrial applications. In 2010, the San Diego region consumed approximately 505 million therms of natural gas (this number does not include gas used for electricity production). Similar to electricity consumption, the majority of natural gas consumption is from the residential and commercial sectors as shown in Figure 34. The RES calls for increased use of natural gas for certain transportation applications, decreased use of natural gas for end-uses like water heating, and more efficient use of natural gas in electricity generation.
Percent of Solid Waste that is Recycled

The State ceased reporting local jurisdictions’ diversion rates in 2007. With the passage of Senate Bill 1016 (Wiggins, 2008), only per capita disposal rates are reported for each jurisdiction. The rates are not reported for the county as a whole. The County of San Diego reports an average of the region’s local jurisdictions, including the unincorporated area. This average is then calculated into a diversion rate that is shown in Figure 35. It should be noted that the County “average” is not a true average because each jurisdiction’s rate is based on its own population. However, it is the only measure available that gives a sense of the region’s rate of recycling.

The percent of solid waste that is recycled in the region increased since 2006, surpassing the state-mandated target, as shown in Figure 35. The target calls for a 50 percent solid waste diversion rate; in 2009 66 percent of solid waste was diverted from landfills.
The County of San Diego is the designated local enforcement agency (LEA) for all solid waste facilities in the region. The City of San Diego is the LEA for facilities within the City of San Diego. The LEAs with concurrence for the Department of Resources Recycling and Recovery (CalRecycle), formerly the California Integrated Waste Management Board (CIWMB), issue operating permits to facilities including landfills, transfer stations, material recovery, and composting facilities.

In general terms, solid waste refers to garbage, refuse, and other discarded solid materials generated by residential, commercial, and industrial activities. CalRecycle identifies 10 categories of wastes: paper, glass, metal, electronics, plastic, other organic, construction and demolition (C&D), household hazardous waste, special waste, and mixed residue. Solid waste generation is measured by disposal and diversion. Disposal is defined in PRC Section 40192 as “the final deposition of solid wastes onto land, into the atmosphere, or into the waters of the state.” Solid waste that is disposed in landfills is measured in volume (cubic yards) and weight (tons). Diversion includes programs and practices such as waste prevention and source reduction, recycling, reuse, and composting that reduce the total amount of waste that requires disposal.

The San Diego region is currently served by three privately operated landfills and one operated by the City of San Diego. The four landfills have a total remaining capacity of 97,411,143 cubic yards and have a total daily throughput of 17,845 tons per day. This includes the Sycamore Landfill expansion that was permitted by CIWMB in 2006 (City of San Diego 2006). There also are two landfills operated by Marine Corps Base Camp Pendleton for its exclusive use. A limited amount of solid waste generated in the San Diego region is also disposed of outside of the region. The four landfills have an estimated average of 48.9 percent remaining capacity (CalRecycle 2011a). Table 8 shows the remaining capacity of landfills located in the San Diego region and their estimated date of closure.
### Table 8
Landfills Located in the San Diego Region

<table>
<thead>
<tr>
<th>Facility</th>
<th>Estimated Closure Date</th>
<th>Throughput (tons/day)</th>
<th>Total Capacity (cubic yards)</th>
<th>Remaining Capacity (cubic yards)</th>
<th>% Remaining Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrego Landfill</td>
<td>10/31/2030</td>
<td>50</td>
<td>844,000</td>
<td>478,836</td>
<td>56.7%</td>
</tr>
<tr>
<td>Otay Landfill</td>
<td>4/30/2021</td>
<td>5,830</td>
<td>62,377,974</td>
<td>33,070,879</td>
<td>53.0%</td>
</tr>
<tr>
<td>West Miramar Landfill</td>
<td>1/3112017</td>
<td>8,000</td>
<td>87,760,000</td>
<td>16,473,000</td>
<td>18.8%</td>
</tr>
<tr>
<td>Sycamore Landfill</td>
<td>12/31/2031</td>
<td>3,965</td>
<td>48,124,462</td>
<td>47,388,428</td>
<td>98.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>17,845</strong></td>
<td><strong>199,106,436</strong></td>
<td><strong>97,411,143</strong></td>
<td><strong>48.9%</strong></td>
</tr>
</tbody>
</table>

Source: CalRecycle 2011

There are 145 recycling centers in the San Diego region that collect recyclable materials. In addition, eight composting facilities in region collect, grind, mix, pile, and add moisture and air to organic materials to speed natural decay and produce a soil amendment. Another five chipping and grinding facilities in the region are designed to reduce the size of compostable material. Recycling, composting, chipping, and grinding all reduce the amount of solid waste that must be disposed of in a landfill.

C&D materials include lumber, drywall, metals, masonry (brick, concrete, etc.), carpet, plastic, pipe, rocks, dirt, paper, cardboard, or green waste related to land development. Metals are the most commonly recycled material while lumber makes up the majority of debris that still goes to a landfill (CalRecycle 2010). There are 19 C&D Recyclers in San Diego, one processing facility, and four inert fill-disposal operations (CalRecycle 2011).

The proposed 1,770-acre Gregory Canyon Landfill site is located in northern San Diego County on SR-76 with a facility area of 308 acres and a disposal footprint of 183 acres. The facility, as currently planned, would have an average daily throughput of 3,200 tons per day and would receive up to 1,000,000 tons of municipal solid waste per year. The total site capacity is 59,000,000 cubic yards and has an estimated closing date of 2040. Gregory Canyon is currently seeking approval of a Solid Waste Facility Permit to operate the landfill, after over 10 years of ballot initiatives, court challenges, and environmental review (Gregory Canyon 2011).

### Conclusion

Regional water consumption has been declining as public awareness increases about water issues. There continues to be an increase in the amount of recycled water used. New indicators from the recently updated RES provide a new illustration of energy usage in the region; the share of energy produced from renewable resources has increased slightly.
Borders

The region’s distinct characteristics present a variety of opportunities and challenges for planning and coordinating along our interregional and binational borders. Access to jobs and housing continues to be an important issue. As people move farther away from their places of employment, increased pressure is placed upon our interregional transportation systems.

Interregional Traffic Volumes into San Diego from Surrounding Counties and Baja California

While in previous years there was an increase of trips into San Diego County, that number has decreased or remained stable in recent years, as shown in Figure 36. There was a slight decrease (from 152,100 in 2008 to 140,200 in 2010) in the number of vehicles traveling between the region and Northern Baja. The number of trips between San Diego and Riverside County decreased slightly in 2009, but has crept back within the last year. In addition, the annual number of pedestrian trips into San Diego from Baja California also slightly declined from 2008 to 2010 to 9,198,913 as shown in Figure 37.

Figure 36
San Diego Region Average Weekday Traffic Volumes to and from Orange, Imperial, and Riverside Counties and Northern Baja, Mexico, 2000 to 2010

Source: Caltrans Traffic Census
Figure 37
Northbound Pedestrian Border Crossings from Baja California into San Diego, 2000 to 2010

Source: U.S. Department of Transportation, Bureau of Transportation Statistics

Border Wait Times

Border wait times in 2010 showed a small decrease from 2009 for both passengers and commercial vehicles. Crossborder passenger vehicle volumes declined while truck volumes have grown. The implementation of tandem inspection booths and the use of travel documents with radio frequency technology likely contributed to the decrease in wait times, as well as the overall decline in travel associated with the economic recession.

Figure 38
Average Border Wait Times – Northbound into San Diego from Tijuana, Mexico, 2008 to 2010

Source: U.S. Customs and Border Protection, Border Wait Times: Southern Border Ports of Entry, 2008-2010
Participation in SENTRI Lanes

There were a total of 126,685 Secure Electronic Network for Travelers Rapid Inspection (SENTRI) participants in 2011, which represents 16,685 more participants than were reported in the last report, as shown in Figure 39. This includes all SENTRI participants for the entire U.S.-Mexico border; SENTRI participants are able to cross at any U.S.-Mexico border crossing.

Figure 39
SENTRI Participants, 2006 to 2011

Source: U.S. Customs and Border Protection

Conclusion

The volume of commutes into San Diego from Baja California has slightly decreased, but the numbers of new participants in the SENTRI program have increased. A slight decrease in wait times may be due to operational improvements at the border crossings.