



Economics Research Associates

## Memorandum

**Date:** December 16, 2004  
**To:** LeAnn Carmichael  
**From:** Bill Anderson, Vice-President **ERA Project No.15682**  
**RE:** Preliminary Estimates of Supportable Retail Lands & Office and Industrial Employment Lands

---

### Introduction

In December 2002, ERA was asked to provide preliminary estimates of how much neighborhood and community serving retail lands the projected resident population may support, and how much office and industrial employment lands the projected workers may support, within each Community Plan Area of the unincorporated county. The projections were based on the build-out population as reported by County staff (in the case of retail lands), San Diego Association of Governments (SANDAG's) projected employment in the year 2020 (in the case of industrial and office lands), and assumptions explained in this memorandum.

The County has asked ERA to update these estimates based on revised population and land use assumptions for the following two scenarios:

1. The Residential Baseline Proposed General Plan Alternative as of July, 2004
2. The Board of Supervisor's Alternative as of August, 2004

For the retail analysis, SANDAG's projected household income assumptions by community were updated. Land-use allocations were also updated based on the recent alternatives, changes in Specific Plan Area assumptions, and changes in the assumed distribution of land use classifications into retail, office, and industrial land uses, developed with County staff. Other assumptions remain the same as in the December 2002 memorandum unless otherwise stated. This memorandum presents the results of this update.

Many of the General Plan land use classifications allow a combination of retail, office, and/or industrial uses. The assumed distribution of General Plan land use classifications into more specific uses was developed with County staff, and are as follows:



| <b>GP Land Use Classification (current and proposed General Plans)</b> | <b>Assumed Retail</b> | <b>Assumed Office</b> | <b>Assumed Industrial</b> |
|--|-----------------------|-----------------------|---------------------------|
| Neighborhood Commercial  | 100%                  |                       |                           |
| General Commercial   | 90%                   | 10%                   |                           |
| Service Commercial   | 20%                   |                       | 80%                       |
| Office Professional  |                       | 100%                  |                           |
| Visitor-Serving Commercial (existing GP)                               | 20%                   |                       |                           |
| Rural Commercial (proposed GP)   | 60%                   | 10%                   |                           |
| Limited Impact Industrial  |                       | 10%                   | 90%                       |
| General Impact Industrial  |                       |                       | 100%                      |

Visitor-Serving Commercial is a designation under the existing General Plan, and includes tourism-related uses as well as retail uses. Under the proposed General Plan update, Visitor-Serving designations are folded into a new Rural Commercial designation that includes visitor-serving uses as well as other rural commercial uses.

The revised estimates of supportable land are compared with 1) the amount of land currently developed for these uses as of 2002, 2) the amount of land planned for these uses under the existing General Plan, which has not changed since the 2002 memorandum, and 3) the amount of land planned for these uses under the two proposed General Plan alternatives.

This analysis is input to the General Plan Update process. The purpose is to initially identify potential areas where the amount of land that is planned for commercial and industrial uses within each Community Plan Area may be insufficient and needs to be increased, or the amount of land planned well exceeds projected demand, thereby providing flexibility for considering land use changes.

The projections of potential demand for retail use is restricted to that generated by the local resident population. Some communities have more retail land planned, indeed already developed, than is necessary to service the local Community Plan Area resident population. While some communities may have a surplus of commercial land designated to serve their existing and projected resident population, they may also serve other populations, such as tourists, travelers, or residents of surrounding communities.

The estimated amount industrial and office land supportable by 2020 is based on SANDAG's projected employment by sector for each CPA (as of December 2002), and countywide average standards of employment density. Some communities currently have more industrial and office land already developed or planned than would be expected given



projected employment. This may be the result of industrial and office uses that have lower than average employment density characteristics.

**These variances illustrate an important point – that the estimated potential land surpluses or deficits for commercial retail, office, and industrial land uses by CPA should not be interpreted definitively. Rather, the estimates and findings presented here should be used as initial guidelines that warrant further refined investigation on a community plan level as the County’s General Plan and respective community plans are updated.**

ERA's methodology and preliminary results are discussed below.

## Neighborhood and Community-Serving Retail Land

The following is a summary of the methodology used to estimate the amount of acres needed for neighborhood and community-serving retail outlets to service CPA residents. Additional land may be supported to serve tourists or residents from surrounding communities.

Briefly, ERA developed retail expenditure factors per household and applied them to the projected households in each community plan area. This potential buying power was then converted into supportable retail space estimates (in square feet). The resulting square footages were converted into net commercial acreage based on standard floor-area ratios (which the County may want to modify for certain community plan areas if they have non-standard commercial densities). Net acreage was then converted into gross acreage for purposes of comparison with 1) currently developed retail gross acreage, 2) retail gross acreage planned under the current General Plan, and 3) retail gross acreage designated under the proposed General Plan for the baseline scenario and the Board scenario. The factors were originally developed in 2002 based on 2001 numbers and relationships. They are still applicable for generally estimating supportable retail acreage for the updated population forecasts.

The results of the analysis are presented in Tables A1 through A12 for the Baseline Proposed General Plan Alternative and Tables B1 through B12 for the Board Alternative, as explained below. These estimates are preliminary and need to be reviewed by the General Plan Team to assess their reasonableness given the actual characteristics and opportunities of each community.

Table A-1 presents total estimated sales in retail outlets to San Diego residents. This table begins with the total taxable sales in retail outlets in San Diego County, as provided by the California State Board of Equalization (data is from 2000, the most recent complete year available at the time of the original analysis, adjusted for inflation to 2001 dollars). A substantial proportion of sales at drug stores, food stores selling all types of liquor, and all other food stores are non-taxable, thus sales in these categories have been increased by factors to account for all sales. Sales of autos, planes and boats were omitted from this analysis. The result is an Estimated Aggregate Retail Expenditures in the selected retail categories of approximately \$27.1 billion (presented in inflation adjusted 2001 dollars).



This estimate of retail expenditures includes tourism expenditures and purchases made by Mexicans who live in Baja who shop in San Diego County, which, if included in this analysis, would distort the eventual sales per household factors. ERA used the results of the 2000 San Diego County Visitor Profile, published by the San Diego Convention and Visitors Bureau, to estimate the magnitude of visitor expenditures in the relevant categories (\$355 million). ERA updated factors from a San Diego Dialogue study and other local data to estimate retail sales to non-resident Mexican Nationals (\$1.5 billion). These expenditures were subtracted from total estimated retail expenditures, providing an estimate of resident expenditures (\$26.7 billion). Next, resident expenditures were divided by the number of San Diego County households in 2000 (994,677)<sup>1</sup>, rendering Estimated Resident Expenditures per Household of \$26,873.

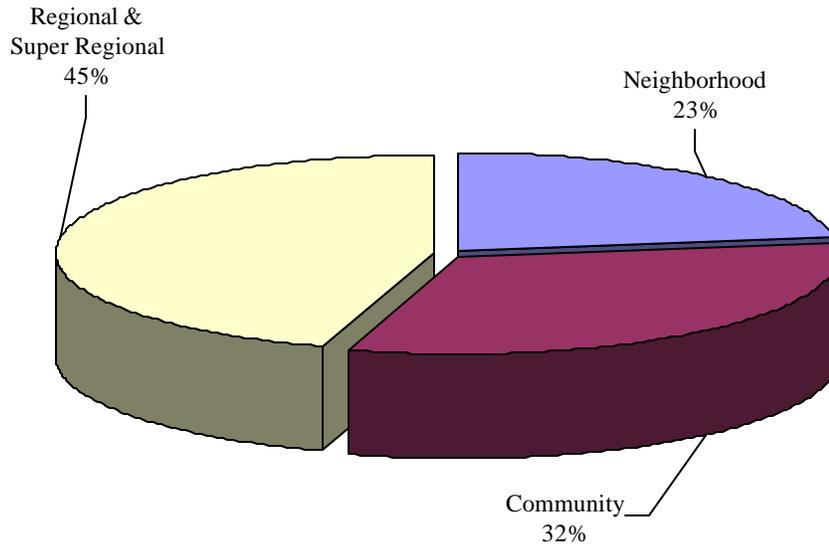
ERA then estimated the distribution of expenditures occurring *within* neighborhood, community, and regional/super-regional centers, and those occurring *outside* of centers, such as in stand alone outlets, strip retail locations, or retail districts (Table A-2).

To determine the magnitude and distribution of expenditures occurring *within* centers, ERA determined the total square feet of retail space in neighborhood, community, and regional/super-regional centers in San Diego County<sup>2</sup>, and multiplied each square footage by industry standard average sales per square foot factors, as reported by ULI Dollars & Cents and ERA's knowledge of market performance (as described in the footnotes to Table A-2). The result is an estimated \$15.8 billion in retail sales within centers, which is distributed as follows:

■ \_\_\_\_\_  
<sup>1</sup> U.S. Census Bureau, 2000 Census.

<sup>2</sup> As reported by the 2000 Shopping Center Directory published by Interactive Market Systems, Inc.

**Figure 1**  
**Distribution of Sales Occurring in Centers by Center Type**



To determine the magnitude of retail sales occurring *outside* retail centers, in strip outlets, stand alone retail stores, and retail districts, ERA took the Estimated Retail Sales in San Diego County (from Table A-1), and subtracted the \$15.8 billion estimated to occur within neighborhood, community, and regional and super-regional centers. The resulting \$11.3 billion is approximately 42 percent of total sales. This means that sales occurring within shopping centers are an estimated 58 percent of sales (distributed between neighborhood, community, and regional/super-regional centers as shown above in **Figure 1**). The resulting distribution of retail sales across center *and* non-center outlets is presented in Figure 2.

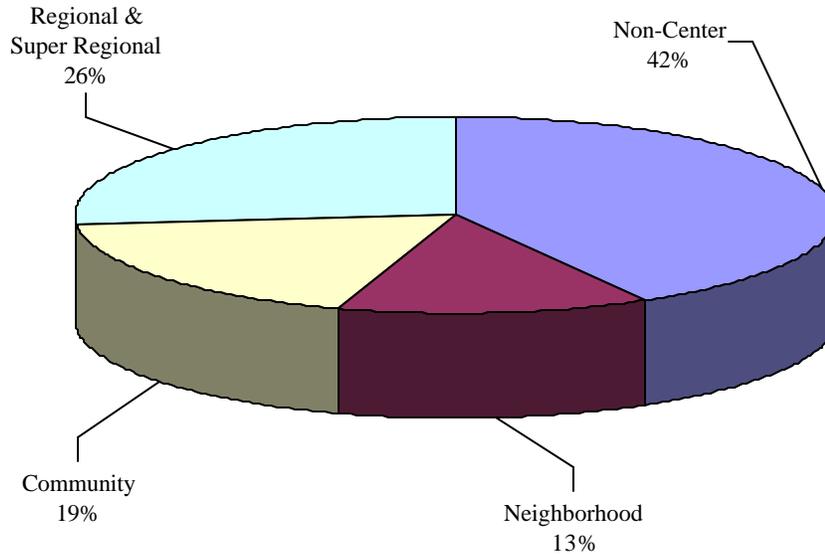
Table A-3 presents estimated buying power by Community Plan Area (CPA) and CPA Subarea Groups in 2020. This exercise uses projected household population and household size assumptions<sup>3</sup> to determine the number of future households in each CPA. 2030 mean income forecasts for each CPA<sup>4</sup> were estimated based on SANDAG's forecast of median household incomes<sup>5</sup>, which were multiplied by the estimated percent of household income spent on retail items (explained below) to yield the Estimated Annual Expenditures

■ \_\_\_\_\_  
<sup>3</sup> Provided by the County.

<sup>4</sup> SANDAG DataWarehouse (2020 Cities/County Forecast) adjusted for inflation to 2001 dollars.

<sup>5</sup> Mean income forecasts data for CPAs is not available. ERA compared CPA median income estimates (2000, per SANDAG) and mean income in related county areas according to the 2000 Census to estimate mean income for each CPA. This assumes that income distribution in each CPA will remain constant. The income distribution in San Dieguito, however, is expected to change with

**Figure 2**  
**Distribution of Total Estimated Retail Sales**



per Household within each CPA (presented in inflation adjusted 2001 dollars). ERA multiplied the Estimated Annual Expenditures per Household by the Estimated Build-out Households, resulting in Estimated CPA Buying Power by build-out (presented in inflation adjusted 2001 dollars). The proportion of household income spent on retail items is adjusted for each CPA given their respective incomes, but not proportionately. Retail expenditures per household is not proportional with changes in income due to a marginal reduction in the propensity to consume as income rises, based on information from the Bureau of Labor Statistics' annual Consumer Expenditures report.<sup>6</sup>

Table A-4 uses the distribution of retail sales occurring in neighborhood center, community center, regional/super-regional center, and non-center outlets determined in Table A-2 to estimate the distribution of CPA buying power (from Table A-3) across these center and non-center outlets. Tables A-5 through A-8 use the Estimated Buying Power by Center Type (from Table A-4) to estimate the supportable gross acres of retail land for each center type, and in non-centers.

Each household will spend a portion of retail dollars outside their own CPA, either in another CPA or in another county jurisdiction. To account for this, a capture rate<sup>7</sup> is applied to the Estimated Buying Power for each center type, resulting in estimates of

---

the addition of more middle-income housing, thus the ratio for this CPA was reduced based on the current rate and the average rate in other CPAs.

<sup>6</sup> "Consumer Expenditures in 2000", U.S. Department of Labor Bureau of Labor Statistics, available at [www.bls.gov/cex/csxann00.pdf](http://www.bls.gov/cex/csxann00.pdf) (2000 is the most recent survey published).

<sup>7</sup> The percent of total resident household retail expenditures that potentially might occur in retail outlets, if provided, in the resident-household's CPA.

captured sales. This iteration of the model uses a capture rate of 90 percent for neighborhood and community centers, and non-center outlets, because in most cases the majority of spending in these types of retail outlets would tend to be within the local community, if the retail outlets are made available. This is an aggressive assumption so as not to underestimate demand for retail land. It should be recognized that many smaller communities, however, lack the critical mass to support their own retail outlets, thus residents must shop in surrounding CPAs.

A capture rate of 0 percent was used for regional/super-regional centers because none of the CPAs have this type of center (thus CPA residents cannot expend money at regional/super-regional centers within their own communities), and none of the CPAs have a large enough population (current or projected) to support a regional center. Market support for a regional center would require multiple CPAs and access to populations in incorporated cities within the center's market area, and must be evaluated on a case-by-case basis.

As shown on Tables A-5 through A-8, the model applies an average sales per square foot factor (from Table A-2) to estimated captured sales in each CPA, producing an estimate of supportable square feet for neighborhood and community retail centers and non-center retail outlets in each CPA. Estimated supportable square footage is converted into acres using a standard floor area ratio (FAR) assumption, which is based on the average FAR in communities served by the County Water Authority (0.25), and those that are not (0.16). The result is the estimated net acreage supportable, which is then converted to gross acres (assuming net acreage equals approximately 85 percent of gross acreage). Table A-9 summarizes the estimated supportable net and gross acreage for each CPA.

Tables A-10 through A-12 compares the estimate of resident-supported retail acres (as summarized on Table A-9), with currently developed retail acres as of 2002 (Table A-10), gross retail acres allowed under the current General Plan (Table A-11), and gross retail acres allowed under the proposed General Plan (Table A-12) in each CPA. For the proposed General Plan comparison, the retail land supply included portions of Neighborhood Commercial, General Commercial, Service Commercial, and Rural Commercial designations.

County staff estimated retail acres in Specific Plan Areas (SPAs), under the current and proposed general plans.

Negative numbers (in parentheses) indicate deficits, areas where further development may be supportable. Positive numbers indicate a surplus, which implies that these CPAs serve broader markets that serve non-residents such as tourists, travelers, or residents from surrounding communities, have other commercial uses on the land besides the household expenditures analyzed, have surplus land for future growth beyond the planning period, or have too much retail land planned. These communities are candidates for reducing the amount of retail land planned, but should first be evaluated on a case-by-case basis to determine that there are no other extenuating reasons these communities support more retail land than their resident population warrants.

*Forecasted Demand vs. 2002 Developed Retail Land*

As Table A-10 (found in the Appendix) shows, the following CPA/Subarea Groups had surpluses/deficits of currently developed retail acres compared with estimated future demand based on County population projections:

***CPAs with a Possible Developed Retail Land Surplus:***

- Central Mountain/Pine Valley
- Desert/Borrego Springs
- Julian
- Lakeside
- Mountain Empire/Boulevard
- Mountain Empire/Jacumba
- Mountain Empire/Lake Moreno/Campo
- Mountain Empire/Tecate
- North Mountain
- North Mountain/Palomar Mountain
- Pendleton-De Luz
- Rainbow
- Ramona
- Spring Valley
- Valle De Oro

***CPAs with a Possible Developed Retail Land Deficit:***

- Alpine
- Bonsall
- Central Mountain
- Central Mountain/Cuyamaca
- Central Mountain/Descanso
- County Islands
- Crest/Dehesa
- Desert
- Fallbrook
- Jamul-Dulzura
- Mountain Empire
- Mountain Empire/Potrero
- North County Metro
- North County Metro/Hidden Meadows
- North County Metro/Twin Oaks
- Otay
- Pala -Pauma
- San Dieguito
- Sweetwater
- Valley Center

The CPAs that have more retail land currently developed than needed to serve the projected population more than likely serve non-resident populations, such as tourists, travelers, or residents of surrounding communities. The CPAs that have a possible deficit may need additional land capacity if the current and proposed General Plan does not provide room for anticipated growth.



### *Forecasted Demand vs. Planned Retail Land Under Current General Plan*

As shown in Table A-11 (in the Appendix), for the majority of communities, the current General Plan allows sufficient retail acreage in comparison with estimated supportable acreage:

#### ***CPAs with a Possible Planned Retail Land Surplus:***

- Alpine
- Bonsall
- Central Mountain/Pine Valley
- Desert/Borrego Springs
- Fallbrook
- Jamul-Dulzura
- Julian
- Lakeside
- Mountain Empire
- Mountain Empire/Boulevard
- Mountain Empire/Jacumba
- Mountain Empire/Lake Morena-Campo
- Mountain Empire/Potrero
- Mountain Empire/Tecate
- North County Metro/Hidden Meadows
- North County Metro/Twin Oaks
- Otay
- Pala-Pauma
- Rainbow
- Ramona
- Spring Valley
- Valle De Oro
- Valley Center

#### ***CPAs with a Possible Planned Retail Land Deficit:***

- Central Mountain
- Central Mountain/Cuyamaca
- Central Mountain/Descanso
- County Islands
- Crest/Dehesa
- Desert
- North County Metro
- North Mountain/North Mountain
- North Mountain/Palomar Mountain
- Pendleton-De Luz
- San Dieguito
- Sweetwater

The communities with a surplus of retail land designated under the current General Plan may not need any more land designated unless there is a compelling reason the land is needed to serve non-resident populations. Some of these communities may be candidates to reduce the amount of retail land designated. The communities that have a deficit may need additional retail land designated unless other communities adequately serve them.



*Forecasted Demand vs. Planned Retail Land Under the Proposed Baseline General Plan Scenario*

Finally, as Table A-12 (in the Appendix) shows, a similar list of communities would have shortages and surpluses of retail acreage under the Proposed General Plan as follows:

***CPAs with a Possible Planned Retail Land Surplus:***

- Alpine
- Bonsall
- Central Mountain/Cuyamaca
- Central Mountain/Descanso
- Central Mountain/Pine Valley
- Desert
- Desert/Borrego Springs
- Fallbrook
- Jamul-Dulzura
- Julian
- Lakeside
- Mountain Empire
- Mountain Empire/Boulevard
- Mountain Empire/Jacumba
- Mountain Empire/Lake Morena-Campo
- Mountain Empire/Potrero
- Mountain Empire/Tecate
- North County Metro/Twin Oaks
- North Mountain
- Otay
- Pala -Pauma
- Rainbow
- Ramona
- Spring Valley
- Valle De Oro
- Valley Center

***CPAs with a Possible Planned Retail Land Deficit:***

- Central Mountain
- County Islands
- Crest/Dehesa
- North County Metro
- North County Metro/Hidden Meadows
- North Mountain/Palomar Mountain
- Pendleton-De Luz
- San Dieguito
- Sweetwater

## Sensitivity Analysis

The above analysis assumes that retail outlets in county areas are average performers on a sales per square foot basis. ERA conducted a sensitivity analysis to determine how lower sales per square foot levels affect projected surpluses/deficits. Reducing sales per square foot increases the amount of supportable retail land; however, the amount of the increase depends upon population and income factors. Sensitivity Scenario 1, shown in Tables A-13 through A-20, tests the demand for retail acreage at lower sales per square foot. Under Sensitivity Scenario 1, average sales are assumed to be \$200 per square foot for neighborhood and community centers and non-center outlets. Tables A-13 through A-16 present estimated supportable gross acreage by center type, and Table A-17 presents a summary of this information.

Table A-18 presents a comparison of estimated supportable retail acres under Scenario 1 and current developed retail acres. Only Rainbow would switch from a slight surplus to a slight deficit.

Table A-19 presents a comparison of estimated supportable retail acres under Sensitivity Scenario 1 and gross retail acreage allowed under the existing General Plan. None of the communities change from a surplus to a deficit.

Table A-20 presents a comparison of estimated supportable retail acres under Sensitivity Scenario 1 and current developed retail acres. The following communities, which reflect a surplus under the original model, would experience a deficit:

- Central Mountain/Cuyamaca
- Central Mountain/Descanso

## The Board Alternative

The Board of Supervisors Alternative, as of August 2004, slightly changes the population and land use distribution for a few communities. These changes were applied to the model and are presented in Appendix B (tables B-1 through B-20). While there were some changes in the estimated amounts, none of the communities experienced a change between surplus and deficits.

## Employment Lands Projections

Tables C-1 through C-8 present projections of industrial and office employment lands.

### *Industrial Land Projections*

Table C-1 presents demand projections for industrial space by CPA, based on SANDAG employment forecasts for 2020 (based on SANDAG's 2020 Cities/County Forecast) as prepared for the county in 2002. Total employment using industrial space<sup>8</sup> is multiplied by an average square foot factor per employee based on the year 2000 countywide average, resulting in an estimate of space demanded in 2020, net incremental acreage demanded in 2020 period, and gross acreage demanded in 2020. Tables C-2 through C-4 compare the Gross Acres Demanded in 2020 from Table C-1 with (1) current developed industrial acres (Table C-2), (2) industrial land allowed in 2020 under the current general plan (Table C-3), and (3) industrial land allowed under the proposed Baseline General Plan scenario (Table C-4). County staff estimated industrial acres in SPAs in 2002 for inclusion in this analysis.

### **2020 Demand vs. Current Developed Industrial Land**

As presented in Table C-2 in the Appendix, the following CPAs have more or less currently developed industrial lands compared with projected demand for 2020:

#### ***CPAs with a Possible Surplus of Developed Industrial Lands:***

- County Islands
- Lakeside
- Mountain Empire
- Pendleton-De Luz
- San Dieguito
- Spring Valley

#### ***CPAs with a Possible Deficit of Developed Industrial Lands:***

- Alpine
- Bonsall
- Central Mountain
- Crest/Dehesa
- Desert
- Fallbrook
- Jamul-Dulzura
- Julian
- North County Metro
- North Mountain
- Otay
- Pala -Pauma
- Rainbow
- Ramona
- Sweetwater
- Valle de Oro
- Valley Center

■ \_\_\_\_\_  
<sup>8</sup> Includes 97% of manufacturing employment; 20% of construction; 40 percent of transportation, communications and public utilities (TCPU) employment; 100% of wholesale trade employment; and 25 percent of services employment.

The communities with more industrial land currently developed than needed to satisfy SANDAG’s forecast of future industrial jobs within the community may presently have industrial uses that have a greater than average amount of industrial space and land per employee, such as warehousing, distribution, industrial yards, etc. If their industrial profile remains the same by 2020, the projected industrial employment in those CPA’s may need more land than estimated here. The surplus developed land, however, may also indicate some under-utilized occupied industrial land that could be used more efficiently, especially if the future industrial profile of the CPA changes over time to industrial uses that require less space per worker.

**2020 Demand vs. Planned Industrial Land Under the Current General Plan**

As shown in Table C-3 in the Appendix, the following CPAs have more/less industrial lands allowed under the current general plan compared with projected demand for 2020:

***CPAs with a Possible Surplus of Industrial Land Planned:***

- Alpine
- Central Mountain
- Desert
- Fallbrook
- Julian
- Lakeside
- Mountain Empire
- North Mountain
- Otay
- Ramona
- San Dieguito
- Spring Valley
- Valley Center

***CPAs with Possible Deficit of Industrial Land Planned:***

- Bonsall
- County Islands
- Crest/Dehesa
- Jamul-Dulzura
- North County Metro
- Pala -Pauma
- Pendleton-De Luz
- Rainbow
- Sweetwater
- Valle de Oro

**2020 Demand vs. Planned Industrial Land Under the Proposed Baseline General Plan Scenario**

Finally, Table C-4 compares industrial acreage allowed under the proposed Baseline General Plan Scenario (as of July 2004) with 2020 demand estimates; surpluses and deficits are as follows:

***CPAs with a Possible Surplus of Industrial Land Planned:***

- Alpine
- Central Mountain
- County Islands
- Desert
- Fallbrook
- Julian
- Lakeside
- Mountain Empire
- Otay
- Ramona
- San Dieguito
- Spring Valley
- Valley Center

***CPAs with a Possible Deficit of Industrial Land Planned:***

- Bonsall
- Crest/Dehesa
- Jamul-Dulzura
- North County Metro
- North Mountain
- Pala -Pauma
- Pendleton-De Luz
- Rainbow
- Sweetwater
- Valle de Oro

Similar to the comparison of industrial lands that are currently developed, communities that show possible surpluses of planned industrial land may contain industrial uses in the future with lower than average employment density per square foot, such as warehousing and distribution. These communities will require more land than employment projections based on averages would imply. Alternatively, the surpluses may imply that some communities will have underutilized and inefficiently used industrial land in the future that could lead to blighting conditions. Finally, a surplus may simply mean that a community has additional capacity for job growth beyond 2020. These possibilities must be evaluated on a case-by-case basis.

***Office Land Projections***

Tables C-5 through C-8 repeat the above process for commercial office space, using SANDAG estimates of employment in 2020 in industries using office space.<sup>9</sup> Estimated demand for office space was compared to the amount of Office Professional land, and portions of General Commercial, Rural Commercial, and Limited Impact Industrial land designated.

▪ \_\_\_\_\_  
<sup>9</sup> Includes 3% of manufacturing employment; 35% of transportation, communications and public utilities (TCPU) employment; 100% of finance, insurance, and real estate (FIRE) employment; 35% of services employment; and 5% of self employed and domestic employment.



County staff estimated office acres in Specific Plan Areas (SPAs) in 2002 for inclusion in this analysis. Table C-5 presents demand projections for office space in 2020 by CPA and Tables C-6 through C-8 compare the Gross Acres Demanded in 2020 from Table C-5 with (1) currently developed office acres (Table C-6), (2) office land allowed in 2020 under the current general plan (Table C-7), and (3) office land allowed under the proposed general plan (Table C-8).

As presented in Table C-6, all CPAs have less currently developed acres of office lands than needed to satisfy projected demand in 2020, except for possibly North Mountain and Pendleton-De Luz.

As shown in Table C-7, all CPAs have a surplus of office lands allowed under the current General Plan compared with projected demand in 2020 except for possibly County Islands, Crest/Dehesa, North County Metro, and Pendleton-De Luz.

### **2020 Demand vs. Planned Office Land Under the Proposed Baseline General Plan Scenario**

Table C-8 compares office acreage allowed under the proposed Baseline General Plan Scenario (as of July 2004) with 2020 demand estimates; surpluses and deficits are presented below.

Much of the surplus in many communities is the amount of General Commercial land designated, which allows office uses. Again, communities that show surpluses of existing or proposed office land may contain office uses with lower than average employment density per square foot and thus require more land than employment projections based on averages would imply, but this is less likely than it is for the industrial analysis. Also, surpluses allow extra capacity for office-related job growth beyond 2020.



***CPAs with a Possible Surplus of Office Land Planned:***

- Alpine
- Bonsall
- Central Mountain
- County Islands
- Desert
- Fallbrook
- Jamul-Dulzura
- Julian
- Lakeside
- Mountain Empire
- North County Metro
- Otay
- Pala Pauma
- Rainbow
- Ramona
- San Dieguito
- Spring Valley
- Sweetwater
- Valle de Oro
- Valley Center

***CPAs with a Possible Deficit of Office Land Planned:***

- Crest/Dehesa
- Pendleton-De Luz

## Summary

As with the retail analysis, these comparisons of estimated future demand for industrial and office land compared to planned supply are preliminary comparisons based on countywide averages and assumptions. They should be used as a starting point for a community-by-community assessment to account for the unique circumstances of each community rather than as definitive recommendations.

Finally, to the extent that surplus land is planned for each land use, they may reflect capacity for future absorption beyond the County's General Plan horizon, or, in the case of employment lands, the year 2020 demand for land.

**Table A-1**  
**Total Estimated Sales in Retail Outlets to San Diego Residents**  
**('000 of 2001 \$)**

|  | <b>'000 of 2001 Dollars</b> |
|--|-----------------------------|
| Estimated Selected Retail Expenditures <sup>1</sup>            | \$27,066,361                |
| Less: Estimated Tourism Related Spending <sup>2</sup>          | \$335,288                   |
| Less: Estimated Expenditures by Mexican Residents <sup>3</sup> | \$1,467                     |
| <b>Estimated Selected Resident Expenditures<sup>4</sup></b>    | <b>\$26,729,606</b>         |
| <br>   |                             |
| Total San Diego County Households (2000) <sup>5</sup>          | 994,677                     |
| <b>Estimated Selected Resident Expenditures Per Household</b>  | <b>\$26,873</b>             |

<sup>1</sup>Based on taxable retail sales in retail outlets San Diego County in 2000 (adjusted for inflation to 2001 dollars) plus non-taxable transactions at drug stores and food stores; Excludes new and used auto sales, and boat, motorcycle and plane dealers.

<sup>2</sup>Based on the distribution of expenditures presented in the San Diego County Visitor Profile (2000).

<sup>3</sup>An ERA estimate based on data from the 1994 San Diego Dialogue Study "Who Crosses the Border" (presented in 2001 dollars.).

<sup>4</sup>Total retail expenditures minus tourism and Mexican national-related expenditures.

<sup>5</sup>U.S. Census Bureau, 2000 Census.

Source: Economics Research Associates, State Board of Equalization and the U.S. Census Bureau.

**Table A-2**  
**Estimated Retail Sales Occurring In Shopping Centers and Outside of Shopping Centers**

**Estimated Retail Sales in Centers by Type (2001)**

|  | <b>Neighborhood</b> | <b>Community</b> | <b>Regional &amp; Super Regional</b> | <b>Total</b>     |
|--|---------------------|------------------|--------------------------------------|------------------|
| <b>GLA of Centers by Type<sup>1</sup></b>        | 14,626,771          | 20,996,191       | 23,141,056                           | 58,764,018       |
| <b>Average Sales Per Square Foot<sup>2</sup></b> | \$245               | \$240            | \$309                                | \$269            |
| <b>Estimated Total Sales</b>                     | \$3,590,385,970     | \$5,041,338,311  | \$7,150,586,304                      | \$15,782,310,585 |
| <b>% of Total Sales by Center Type</b>           | 23%                 | 32%              | 45%                                  | 100%             |

**Estimated Retail Sales Occurring Outside Centers**

|   |                  |
|---|------------------|
| <b>Estimated Retail Sales in San Diego County, 2001<sup>3</sup></b> | \$27,066,360,540 |
| <b>Estimated Retail Sales In Centers</b>                            | \$15,782,310,585 |
| <b>Retail Sales Occurring Outside of Centers</b>                    | \$11,284,049,955 |
| <b>% of Retail Sales Occurring Outside of Centers</b>               | 42%              |

**Distribution of Total Estimated Retail Sales**

| <b>Type of Outlet</b>                | <b>% of Sales</b> |
|--------------------------------------|-------------------|
| <b>Non-Center</b>                    | 42%               |
| <b>Neighborhood</b>                  | 13%               |
| <b>Community</b>                     | 19%               |
| <b>Regional &amp; Super Regional</b> | 26%               |

<sup>1</sup>The Shopping Center Directory (Interactive Market Systems, Inc.). Includes only those centers reporting size.

<sup>2</sup>Community sales per sq.ft. as reported by ULI Dollars & Cents, 2000 (reported in 2001 \$). Neighborhood sales per sq.ft. is 80% of ULI figure. Regional & Superregional figure is an ERA estimate based on local data sources and estimates.

<sup>3</sup>Total estimated sales in retail outlets only, less tourism expenditures and expenditures by non-resident Mexican nationals; excludes auto, boat, motorcycle and aircraft sales (see Table 1). Presented in 2001 \$.

Source: The Shopping Center Directory, ULI Dollars & Cents (2000), California State Board of Equalization and Economics Research Associates

**Table A-3**  
**Buying Power by CPA<sup>1</sup>**

| Community Planning Area (CPA)         | Subarea Group     | Estimated Build-out Group                         |   |   | Estimated Build-out Household Size <sup>2</sup> | Estimated Build-out Households <sup>1</sup> | 2030 Median Income (\$2001) <sup>2</sup> | Estimated 2030 Mean Income (\$2001) <sup>3</sup> | Estimated % of Income Spent on Retail Items <sup>4</sup> | Estimated Annual Expenditures Per Household (\$2001) | Estimated CPA Resident Buying Power (\$2001) |
|---------------------------------------|-------------------|---|---|---|---|---|--|--|--|--|--|
|                                       |                   | Estimated Build-out Total Population <sup>1</sup> | Estimated Build-out Population <sup>1</sup> | Estimated Build-out Households <sup>1</sup> |   |   |  |  |  |  |  |
| Alpine                                |                   | 29,372  | 498   | 28,874                                      | 2,908   | 9,929                                       | \$89,389                                 | \$136,765  | 22%  | \$30,088   | \$298,751,032                                |
| Barona                                |                   | 537   | 2   | 535   | 3,636   | 147   | n/a                                      | n/a  | n/a  | n/a  | n/a  |
| Bonsall                               | Bonsall           | 14,566  | 65  | 14,501                                      | 2,907   | 4,988                                       | 79,047                                   | 127,265  | 22%  | 27,998   | 139,663,983                                  |
| Central Mountain                      |                   | 147   | 0   | 147   | 2,875   | 51  | 70,780                                   | 57,332   | 29%  | 16,626   | 850,112                                      |
| Central Mountain                      | Cuyamaca          | 613   | 0   | 613   | 2,426   | 253   | 70,780                                   | 57,332   | 29%  | 16,626   | 4,201,130                                    |
| Central Mountain                      | Descanso          | 2,728   | 500   | 2,228                                       | 2,696   | 826   | 70,780                                   | 57,332   | 29%  | 16,626   | 13,740,159                                   |
| Central Mountain                      | Pine Valley       | 2,760   | 0   | 2,760                                       | 2,746   | 1,005                                       | 70,780                                   | 57,332   | 29%  | 16,626   | 16,711,099                                   |
| County Islands                        |                   | 3,140   | 1   | 3,139                                       | 3,476   | 903   | 93,999                                   | 120,319  | 22%  | 26,470   | 23,903,844                                   |
| Crest/Dehesa                          |                   | 11,119  | 85  | 11,034                                      | 3,026   | 3,646                                       | 98,298                                   | 108,128  | 22%  | 23,788   | 86,740,884                                   |
| Desert                                |                   | 1,412   | 71  | 1,341                                       | 2,369   | 566   | 47,494                                   | 76,465   | 22%  | 16,822   | 9,522,469                                    |
| Desert                                | Borrego Springs   | 14,034  | 10  | 14,024                                      | 2,345   | 5,980                                       | 47,494                                   | 76,465   | 22%  | 16,822   | 100,603,919                                  |
| Fallbrook                             |                   | 60,987  | 376   | 60,611                                      | 3,065   | 19,775                                      | 70,826                                   | 99,157   | 22%  | 21,814   | 431,385,467                                  |
| Jamul-Dulzura                         |                   | 21,401  | 81  | 21,320                                      | 3,194   | 6,675                                       | 98,975                                   | 117,780  | 22%  | 25,912   | 172,960,857                                  |
| Julian                                |                   | 3,922   | 47  | 3,875                                       | 2,575   | 1,505                                       | 63,584                                   | 94,740   | 22%  | 20,843   | 31,365,328                                   |
| Lakeside <sup>5</sup>                 |                   | 87,862  | 741   | 87,121                                      | 2,983   | 29,206                                      | 68,920                                   | 82,015   | 22%  | 18,043   | 526,969,672                                  |
| Mountain Empire                       |                   | 239   | 0   | 239   | 2,881   | 83  | 49,481                                   | 67,294   | 22%  | 14,805   | 1,228,150                                    |
| Mountain Empire                       | Boulevard         | 2,841   | 179   | 2,662                                       | 2,816   | 945   | 49,481                                   | 67,294   | 22%  | 14,805   | 13,994,979                                   |
| Mountain Empire                       | Jacumba           | 3,420   | 0   | 3,420                                       | 2,697   | 1,268                                       | 49,481                                   | 67,294   | 22%  | 14,805   | 18,773,360                                   |
| Mountain Empire                       | Lake Morena/Campo | 4,966   | 300   | 4,666                                       | 2,866   | 1,628                                       | 49,481                                   | 67,294   | 22%  | 14,805   | 24,102,683                                   |
| Mountain Empire                       | Potrero           | 2,234   | 0   | 2,234                                       | 3,238   | 690   | 49,481                                   | 67,294   | 22%  | 14,805   | 10,214,172                                   |
| Mountain Empire                       | Tecate            | 433   | 0   | 433   | 2,891   | 150   | 49,481                                   | 67,294   | 22%  | 14,805   | 2,217,362                                    |
| North County Metro                    |                   | 64,912  | 550   | 64,362                                      | 3,146   | 20,458                                      | 81,787                                   | 92,419   | 22%  | 20,332   | 415,964,621                                  |
| North County Metro                    | Hidden Meadows    | 11,293  | 77  | 11,216                                      | 2,716   | 4,130                                       | 81,787                                   | 92,419   | 22%  | 20,332   | 83,964,135                                   |
| North County Metro                    | Twin Oaks         | 4,034   | 8   | 4,026                                       | 2,986   | 1,348                                       | 81,787                                   | 92,419   | 22%  | 20,332   | 27,413,819                                   |
| North Mountain                        | North Mountain    | 5,281   | 152   | 5,129                                       | 2,571   | 1,995                                       | 47,814                                   | 55,464   | 29%  | 16,085   | 32,087,802                                   |
| North Mountain                        | Palomar Mountain  | 522   | 0   | 522   | 2,306   | 522   | 47,814                                   | 55,464   | 29%  | 16,085   | 3,640,999                                    |
| Otay                                  |                   | 13,484  | 8,071                                       | 5,413                                       | 2,888   | 1,874                                       | 94,913                                   | 121,489  | 22%  | 26,728   | 50,095,697                                   |
| Pala-Pauma                            | Pala-Pauma        | 12,674  | 132   | 12,542                                      | 3,521   | 3,562                                       | 64,123                                   | 82,077   | 22%  | 18,057   | 64,319,923                                   |
| Pendleton-De Luz                      |                   | 38,341  | 16,175                                      | 22,166                                      | 3,556   | 6,233                                       | 50,282                                   | 55,813   | 29%  | 16,186   | 100,892,862                                  |
| Rainbow                               |                   | 3,516   | 8   | 3,508                                       | 2,896   | 1,211                                       | 65,959                                   | 60,022   | 29%  | 17,406   | 21,084,911                                   |
| Ramona                                |                   | 53,409  | 266   | 53,143                                      | 3,221   | 16,499                                      | 80,866                                   | 97,040   | 22%  | 21,349   | 352,231,075                                  |
| San Diego                             |                   | 32,333  | 8   | 32,325                                      | 2,850   | 11,342                                      | 138,193                                  | 178,269  | 22%  | 39,219   | 444,828,886                                  |
| Spring Valley                         |                   | 66,862  | 388   | 66,474                                      | 3,232   | 20,567                                      | 65,279                                   | 71,807   | 22%  | 15,798   | 324,916,238                                  |
| Sweetwater                            |                   | 15,276  | 155   | 15,121                                      | 3,155   | 4,793                                       | 94,676                                   | 111,718  | 22%  | 24,578   | 117,794,963                                  |
| Valle De Oro                          |                   | 42,851  | 225   | 42,626                                      | 2,948   | 14,459                                      | 92,458                                   | 118,346  | 22%  | 26,036   | 376,463,388                                  |
| Valley Center                         |                   | 40,842  | 99  | 40,743                                      | 3,082   | 13,220                                      | 74,601                                   | 93,997   | 22%  | 20,679   | 273,374,591                                  |
| <b>Community Planning Areas Total</b> |                   | <b>674,363</b>                                    | <b>29,270</b>                               | <b>645,093</b>                              | <b>--</b>                                       | <b>212,140</b>                              | <b>--</b>                                | <b>--</b>  | <b>--</b>  | <b>--</b>  | <b>\$4,616,974,570</b>                       |

<sup>1</sup>Under Proposed General Plan population and size assumptions for the July 2004 Baseline scenario provided by the County.

<sup>2</sup>Based on SANDAG 2030 Cities/County Forecast (presented in \$ 2001).

<sup>3</sup>ERA estimate based on current relationship between median and mean incomes (as reported by SANDAG and Census data).

<sup>4</sup>Based on ratios of expenditures to income reported in "Consumer Expenditures in 2000", Bureau of Labor Statistics.

<sup>5</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

<sup>6</sup>Including incorporated areas.

Sources: Technology Associates International Corporation, State of California Board of Equalization, and Economics Research Associates.

**Table A-4  
Resident Buying Power by Type of Center**

|                               |                   | Estimated Buying Power by Type of Center (\$2001) <sup>1</sup> |                      |                      |                        |                        |
|-------------------------------|-------------------|--|----------------------|----------------------|------------------------|------------------------|
|                               |                   | 13%  | 19%                  | 26%                  | 42%                    |                        |
| Community Planning Area (CPA) | Subarea Group     | Estimated CPA Resident Buying Power (\$2001)                   | Regional & Super     |                      |                        | Non-Center             |
|                               |                   |  | Neighborhood         | Community            | Regional               |                        |
| Alpine                        |                   | \$298,751,032  | \$39,629,691         | \$55,644,904         | \$78,926,202           | \$124,550,235          |
| Barona                        |                   | n/a  | n/a                  | n/a                  | n/a                    | n/a                    |
| Bonsall                       | Bonsall           | 139,663,983  | 18,526,599           | 26,013,597           | 36,897,438             | 58,226,349             |
| Central Mountain              |                   | 850,112  | 112,768              | 158,340              | 224,589                | 354,414                |
| Central Mountain              | Cuyamaca          | 4,201,130  | 557,285              | 782,496              | 1,109,885              | 1,751,464              |
| Central Mountain              | Descanso          | 13,740,159   | 1,822,649            | 2,559,221            | 3,629,974              | 5,728,315              |
| Central Mountain              | Pine Valley       | 16,711,099   | 2,216,748            | 3,112,583            | 4,414,859              | 6,966,909              |
| County Islands                |                   | 23,903,844   | 3,170,874            | 4,452,293            | 6,315,090              | 9,965,587              |
| Crest/Dehesa                  |                   | 86,740,884   | 11,506,285           | 16,156,222           | 22,915,832             | 36,162,545             |
| Desert                        |                   | 9,522,469  | 1,263,167            | 1,773,640            | 2,515,714              | 3,969,947              |
| Desert                        | Borrego Springs   | 100,603,919  | 13,345,233           | 18,738,330           | 26,578,269             | 41,942,087             |
| Fallbrook                     |                   | 431,385,467  | 57,223,812           | 80,349,188           | 113,966,523            | 179,845,944            |
| Jamul-Dulzura                 |                   | 172,960,857  | 22,943,470           | 32,215,421           | 45,694,046             | 72,107,920             |
| Julian                        |                   | 31,365,328   | 4,160,649            | 5,842,057            | 8,286,319              | 13,076,303             |
| Lakeside <sup>2</sup>         |                   | 526,969,672  | 69,903,174           | 98,152,553           | 139,218,648            | 219,695,296            |
| Mountain Empire               |                   | 1,228,150  | 162,916              | 228,753              | 324,462                | 512,020                |
| Mountain Empire               | Boulevard         | 13,994,979   | 1,856,451            | 2,606,683            | 3,697,294              | 5,834,550              |
| Mountain Empire               | Jacumba           | 18,773,360   | 2,490,309            | 3,496,697            | 4,959,682              | 7,826,672              |
| Mountain Empire               | Lake Morena/Campo | 24,102,683   | 3,197,251            | 4,489,328            | 6,367,621              | 10,048,484             |
| Mountain Empire               | Potrero           | 10,214,172   | 1,354,922            | 1,902,476            | 2,698,454              | 4,258,320              |
| Mountain Empire               | Tecate            | 2,217,362  | 294,136              | 413,002              | 585,799                | 924,425                |
| North County Metro            |                   | 415,964,621  | 55,178,218           | 77,476,925           | 109,892,533            | 173,416,945            |
| North County Metro            | Hidden Meadows    | 83,964,135   | 11,137,946           | 15,639,029           | 22,182,251             | 35,004,909             |
| North County Metro            | Twin Oaks         | 27,413,819   | 3,636,477            | 5,106,055            | 7,242,381              | 11,428,907             |
| North Mountain                | North Mountain    | 32,087,802   | 4,256,486            | 5,976,624            | 8,477,187              | 13,377,505             |
| North Mountain                | Palomar Mountain  | 3,640,999  | 482,983              | 678,167              | 961,905                | 1,517,944              |
| Otay                          |                   | 50,095,697   | 6,645,256            | 9,330,747            | 13,234,642             | 20,885,052             |
| Pala-Pauma                    | Pala-Pauma        | 64,319,923   | 8,532,117            | 11,980,129           | 16,992,501             | 26,815,176             |
| Pendleton-De Luz              |                   | 100,892,862  | 13,383,562           | 18,792,148           | 26,654,604             | 42,062,548             |
| Rainbow                       |                   | 21,084,911   | 2,796,939            | 3,927,243            | 5,570,364              | 8,790,365              |
| Ramona                        |                   | 352,231,075  | 46,723,885           | 65,606,013           | 93,054,945             | 146,846,231            |
| San Dieguito                  |                   | 444,828,886  | 59,007,098           | 82,853,138           | 117,518,103            | 185,450,547            |
| Spring Valley                 |                   | 324,916,238  | 43,100,538           | 60,518,394           | 85,838,715             | 135,458,591            |
| Sweetwater                    |                   | 117,794,963  | 15,625,647           | 21,940,307           | 31,119,923             | 49,109,087             |
| Valle De Oro                  |                   | 376,463,388  | 49,938,331           | 70,119,486           | 99,456,813             | 156,948,758            |
| Valley Center                 |                   | 273,374,591  | 36,263,475           | 50,918,327           | 72,222,071             | 113,970,718            |
| <b>Total</b>                  |                   | <b>\$4,616,974,570</b>   | <b>\$612,447,348</b> | <b>\$859,950,519</b> | <b>\$1,219,745,635</b> | <b>\$1,924,831,069</b> |

<sup>1</sup>Based on distribution established in Table 2.

<sup>2</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA.

Sources: Technology Associates International Corporation, California State Board of Equalization, and Economics Research Associates.

**Table A-5  
Resident Supported Gross Acres of Retail Space in Neighborhood Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Buying Power:<br>Neighborhood Centers<br>(\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales per Sq.Ft.<br>(\$2001) <sup>2</sup> | Estimated Supportable Sq.<br>Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>6</sup> |
|-------------------------------|-------------------|---|---------------------------|-------------------------|---|---|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$39,629,691  | 90%                       | \$35,666,722            | \$245   | 145,302                                       | 0.25                        | 13.34                              | 15.70                                |
| Barona                        |                   | n/a   | 90%                       | n/a                     | 245   | n/a   | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 18,526,599  | 90%                       | 16,673,939              | 245   | 67,927  | 0.25                        | 6.24                               | 7.34                                 |
| Central Mountain              |                   | 112,768   | 90%                       | 101,492                 | 245   | 413   | 0.16                        | 0.06                               | 0.07                                 |
| Central Mountain              | Cuyamaca          | 557,285   | 90%                       | 501,557                 | 245   | 2,043   | 0.16                        | 0.29                               | 0.34                                 |
| Central Mountain              | Descanso          | 1,822,649   | 90%                       | 1,640,384               | 245   | 6,683   | 0.16                        | 0.96                               | 1.13                                 |
| Central Mountain              | Pine Valley       | 2,216,748   | 90%                       | 1,995,073               | 245   | 8,128   | 0.16                        | 1.17                               | 1.37                                 |
| County Islands                |                   | 3,170,874   | 90%                       | 2,853,787               | 245   | 11,626  | 0.25                        | 1.07                               | 1.26                                 |
| Crest/Dehesa                  |                   | 11,506,285  | 90%                       | 10,355,656              | 245   | 42,188  | 0.25                        | 3.87                               | 4.56                                 |
| Desert                        |                   | 1,263,167   | 90%                       | 1,136,850               | 245   | 4,631   | 0.16                        | 0.66                               | 0.78                                 |
| Desert                        | Borrego Springs   | 13,345,233  | 90%                       | 12,010,710              | 245   | 48,930  | 0.16                        | 7.02                               | 8.26                                 |
| Fallbrook                     |                   | 57,223,812  | 90%                       | 51,501,431              | 245   | 209,810                                       | 0.25                        | 19.27                              | 22.67                                |
| Jamul-Dulzura                 |                   | 22,943,470  | 90%                       | 20,649,123              | 245   | 84,122  | 0.25                        | 7.72                               | 9.09                                 |
| Julian                        |                   | 4,160,649   | 90%                       | 3,744,584               | 245   | 15,255  | 0.16                        | 2.19                               | 2.58                                 |
| Lakeside <sup>6</sup>         |                   | 69,903,174  | 90%                       | 62,912,857              | 245   | 256,299                                       | 0.25                        | 23.54                              | 27.69                                |
| Mountain Empire               |                   | 162,916   | 90%                       | 146,624                 | 245   | 597   | 0.16                        | 0.09                               | 0.10                                 |
| Mountain Empire               | Boulevard         | 1,856,451   | 90%                       | 1,670,806               | 245   | 6,807   | 0.16                        | 0.98                               | 1.15                                 |
| Mountain Empire               | Jacumba           | 2,490,309   | 90%                       | 2,241,278               | 245   | 9,131   | 0.16                        | 1.31                               | 1.54                                 |
| Mountain Empire               | Lake Morena/Campo | 3,197,251   | 90%                       | 2,877,526               | 245   | 11,723  | 0.16                        | 1.68                               | 1.98                                 |
| Mountain Empire               | Potrero           | 1,354,922   | 90%                       | 1,219,430               | 245   | 4,968   | 0.16                        | 0.71                               | 0.84                                 |
| Mountain Empire               | Tecate            | 294,136   | 90%                       | 264,722                 | 245   | 1,078   | 0.16                        | 0.15                               | 0.18                                 |
| North County Metro            |                   | 55,178,218  | 90%                       | 49,660,396              | 245   | 202,310                                       | 0.25                        | 18.58                              | 21.86                                |
| North County Metro            | Hidden Meadows    | 11,137,946  | 90%                       | 10,024,151              | 245   | 40,837  | 0.25                        | 3.75                               | 4.41                                 |
| North County Metro            | Twin Oaks         | 3,636,477   | 90%                       | 3,272,829               | 245   | 13,333  | 0.25                        | 1.22                               | 1.44                                 |
| North Mountain                | North Mountain    | 4,256,486   | 90%                       | 3,830,838               | 245   | 15,606  | 0.16                        | 2.24                               | 2.63                                 |
| North Mountain                | Palomar Mountain  | 482,983   | 90%                       | 434,685                 | 245   | 1,771   | 0.16                        | 0.25                               | 0.30                                 |
| Otay                          |                   | 6,645,256   | 90%                       | 5,980,730               | 245   | 24,365  | 0.16                        | 3.50                               | 4.11                                 |
| Pala-Pauma                    | Pala-Pauma        | 8,532,117   | 90%                       | 7,678,905               | 245   | 31,283  | 0.25                        | 2.87                               | 3.38                                 |
| Pendleton-De Luz              |                   | 13,383,562  | 90%                       | 12,045,206              | 245   | 49,071  | 0.25                        | 4.51                               | 5.30                                 |
| Rainbow                       |                   | 2,796,939   | 90%                       | 2,517,245               | 245   | 10,255  | 0.25                        | 0.94                               | 1.11                                 |
| Ramona                        |                   | 46,723,885  | 90%                       | 42,051,496              | 245   | 171,312                                       | 0.25                        | 15.73                              | 18.51                                |
| San Dieguito                  |                   | 59,007,098  | 90%                       | 53,106,388              | 245   | 216,349                                       | 0.25                        | 19.87                              | 23.37                                |
| Spring Valley                 |                   | 43,100,538  | 90%                       | 38,790,484              | 245   | 158,027                                       | 0.25                        | 14.51                              | 17.07                                |
| Sweetwater                    |                   | 15,625,647  | 90%                       | 14,063,082              | 245   | 57,291  | 0.25                        | 5.26                               | 6.19                                 |
| Valle De Oro                  |                   | 49,938,331  | 90%                       | 44,944,498              | 245   | 183,098                                       | 0.25                        | 16.81                              | 19.78                                |
| Valley Center                 |                   | 36,263,475  | 90%                       | 32,637,128              | 245   | 132,959                                       | 0.25                        | 12.21                              | 14.36                                |
| <b>Total</b>                  |                   | <b>\$612,447,348</b>  | <b>--</b>                 | <b>\$551,202,613</b>    | <b>--</b>   | <b>2,245,529</b>                              | <b>--</b>                   | <b>214.58</b>                      | <b>252.44</b>                        |

<sup>1</sup> Assumed percentage of resident expenditures that will occur within CPA if retail is made available.

<sup>2</sup> 80% of average sales per sq.ft. for neighborhood centers reported by ULI Dollars & Cents of Shopping Centers 2000 for the western United States, reported in 2001 dollars.

<sup>3</sup> Estimated buying power divided by average sales per square foot.

<sup>4</sup> Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup> Net acreage equal to 85% of gross acreage.

<sup>6</sup> Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table A-6  
Resident Supported Gross Acres of Retail Space in Community Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Buying Power: Community Centers (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales per Sq.Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>6</sup> |
|-------------------------------|-------------------|--|---------------------------|-------------------------|--|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$55,644,904                                       | 90%                       | \$50,080,413            | \$240  | 208,575                                    | 0.25                        | 19.15                              | 22.53                                |
| Barona                        |                   | n/a  | 90%                       | n/a                     | 240  | 0  | 0.25                        | 0                                  | 0                                    |
| Bonsall                       | Bonsall           | 26,013,597   | 90%                       | 23,412,237              | 240  | 97,507                                     | 0.25                        | 8.95                               | 10.53                                |
| Central Mountain              |                   | 158,340  | 90%                       | 142,506                 | 240  | 594  | 0.16                        | 0.09                               | 0.10                                 |
| Central Mountain              | Cuyamaca          | 782,496  | 90%                       | 704,246                 | 240  | 2,933                                      | 0.16                        | 0.42                               | 0.50                                 |
| Central Mountain              | Descanso          | 2,559,221  | 90%                       | 2,303,299               | 240  | 9,593                                      | 0.16                        | 1.38                               | 1.62                                 |
| Central Mountain              | Pine Valley       | 3,112,583  | 90%                       | 2,801,325               | 240  | 11,667                                     | 0.16                        | 1.67                               | 1.97                                 |
| County Islands                |                   | 4,452,293  | 90%                       | 4,007,064               | 240  | 16,689                                     | 0.25                        | 1.53                               | 1.80                                 |
| Crest/Dehesa                  |                   | 16,156,222   | 90%                       | 14,540,600              | 240  | 60,559                                     | 0.25                        | 5.56                               | 6.54                                 |
| Desert                        |                   | 1,773,640  | 90%                       | 1,596,276               | 240  | 6,648                                      | 0.16                        | 0.95                               | 1.12                                 |
| Desert                        | Borrego Springs   | 18,738,330   | 90%                       | 16,864,497              | 240  | 70,237                                     | 0.16                        | 10.08                              | 11.86                                |
| Fallbrook                     |                   | 80,349,188   | 90%                       | 72,314,269              | 240  | 301,175                                    | 0.25                        | 27.66                              | 32.54                                |
| Jamul-Dulzura                 |                   | 32,215,421   | 90%                       | 28,993,879              | 240  | 120,754                                    | 0.25                        | 11.09                              | 13.05                                |
| Julian                        |                   | 5,842,057  | 90%                       | 5,257,852               | 240  | 21,898                                     | 0.16                        | 3.14                               | 3.70                                 |
| Lakeside <sup>6</sup>         |                   | 98,152,553   | 90%                       | 88,337,298              | 240  | 367,908                                    | 0.25                        | 33.78                              | 39.75                                |
| Mountain Empire               |                   | 228,753  | 90%                       | 205,878                 | 240  | 857  | 0.16                        | 0.12                               | 0.14                                 |
| Mountain Empire               | Boulevard         | 2,606,683  | 90%                       | 2,346,015               | 240  | 9,771                                      | 0.16                        | 1.40                               | 1.65                                 |
| Mountain Empire               | Jacumba           | 3,496,697  | 90%                       | 3,147,027               | 240  | 13,107                                     | 0.16                        | 1.88                               | 2.21                                 |
| Mountain Empire               | Lake Morena/Campo | 4,489,328  | 90%                       | 4,040,396               | 240  | 16,827                                     | 0.16                        | 2.41                               | 2.84                                 |
| Mountain Empire               | Potrero           | 1,902,476  | 90%                       | 1,712,228               | 240  | 7,131                                      | 0.16                        | 1.02                               | 1.20                                 |
| Mountain Empire               | Tecate            | 413,002  | 90%                       | 371,702                 | 240  | 1,548                                      | 0.16                        | 0.22                               | 0.26                                 |
| North County Metro            |                   | 77,476,925   | 90%                       | 69,729,232              | 240  | 290,409                                    | 0.25                        | 26.67                              | 31.37                                |
| North County Metro            | Hidden Meadows    | 15,639,029   | 90%                       | 14,075,126              | 240  | 58,620                                     | 0.25                        | 5.38                               | 6.33                                 |
| North County Metro            | Twin Oaks         | 5,106,055  | 90%                       | 4,595,450               | 240  | 19,139                                     | 0.25                        | 1.76                               | 2.07                                 |
| North Mountain                | North Mountain    | 5,976,624  | 90%                       | 5,378,962               | 240  | 22,402                                     | 0.16                        | 3.21                               | 3.78                                 |
| North Mountain                | Palomar Mountain  | 678,167  | 90%                       | 610,350                 | 240  | 2,542                                      | 0.16                        | 0.36                               | 0.43                                 |
| Otay                          |                   | 9,330,747  | 90%                       | 8,397,672               | 240  | 34,975                                     | 0.16                        | 5.02                               | 5.90                                 |
| Pala-Pauma                    | Pala-Pauma        | 11,980,129   | 90%                       | 10,782,116              | 240  | 44,905                                     | 0.25                        | 4.12                               | 4.85                                 |
| Pendleton-De Luz              |                   | 18,792,148   | 90%                       | 16,912,933              | 240  | 70,439                                     | 0.25                        | 6.47                               | 7.61                                 |
| Rainbow                       |                   | 3,927,243  | 90%                       | 3,534,518               | 240  | 14,721                                     | 0.25                        | 1.35                               | 1.59                                 |
| Ramona                        |                   | 65,606,013   | 90%                       | 59,045,412              | 240  | 245,913                                    | 0.25                        | 22.58                              | 26.57                                |
| San Dieguito                  |                   | 82,853,138   | 90%                       | 74,567,824              | 240  | 310,560                                    | 0.25                        | 28.52                              | 33.55                                |
| Spring Valley                 |                   | 60,518,394   | 90%                       | 54,466,555              | 240  | 226,843                                    | 0.25                        | 20.83                              | 24.51                                |
| Sweetwater                    |                   | 21,940,307   | 90%                       | 19,746,276              | 240  | 82,239                                     | 0.25                        | 7.55                               | 8.88                                 |
| Valle De Oro                  |                   | 70,119,486   | 90%                       | 63,107,538              | 240  | 262,831                                    | 0.25                        | 24.14                              | 28.39                                |
| Valley Center                 |                   | 50,918,327   | 90%                       | 45,826,494              | 240  | 190,858                                    | 0.25                        | 17.53                              | 20.62                                |
| <b>Total</b>                  |                   | <b>\$859,950,519</b>                               | <b>--</b>                 | <b>\$773,955,467</b>    | <b>--</b>                                      | <b>3,223,374</b>                           | <b>--</b>                   | <b>308.02</b>                      | <b>362.37</b>                        |

<sup>1</sup> Assumed percentage of resident expenditures that will occur within CPA if retail is made available.

<sup>2</sup> Based on ULI Dollars & Cents of Shopping Centers (2000) for the western United States, reported in 2001 dollars.

<sup>3</sup> Estimated buying power divided by average sales per square foot.

<sup>4</sup> Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup> Net acreage equal to 85% of gross acreage.

<sup>6</sup> Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table A-7  
Resident Supported Gross Acres of Retail Space in Regional and Super Regional Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Buying Power: Regional & Super-Regional Centers (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales per Sq. Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>6</sup> |
|-------------------------------|-------------------|--|---------------------------|-------------------------|---|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$78,926,202   | 0%                        | \$0                     | \$309   | -  | 0.25                        | -                                  | -                                    |
| Barona                        |                   | n/a  | 0%                        | n/a                     | 309   | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 36,897,438   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Central Mountain              |                   | 224,589  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Cuyamaca          | 1,109,885  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Descanso          | 3,629,974  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Pine Valley       | 4,414,859  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| County Islands                |                   | 6,315,090  | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Crest/Dehesa                  |                   | 22,915,832   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Desert                        |                   | 2,515,714  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Desert                        | Borrego Springs   | 26,578,269   | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Fallbrook                     |                   | 113,966,523  | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Jamul-Dulzura                 |                   | 45,694,046   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Julian                        |                   | 8,286,319  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Lakeside <sup>6</sup>         |                   | 139,218,648  | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Mountain Empire               |                   | 324,462  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Boulevard         | 3,697,294  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Jacumba           | 4,959,682  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Lake Morena/Campo | 6,367,621  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Potrero           | 2,698,454  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Tecate            | 585,799  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| North County Metro            |                   | 109,892,533  | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| North County Metro            | Hidden Meadows    | 22,182,251   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| North County Metro            | Twin Oaks         | 7,242,381  | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| North Mountain                | North Mountain    | 8,477,187  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| North Mountain                | Palomar Mountain  | 961,905  | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Otay                          |                   | 13,234,642   | 0%                        | 0                       | 309   | -  | 0.16                        | -                                  | -                                    |
| Pala-Pauma                    | Pala-Pauma        | 16,992,501   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Pendleton-De Luz              |                   | 26,654,604   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Rainbow                       |                   | 5,570,364  | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Ramona                        |                   | 93,054,945   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| San Dieguito                  |                   | 117,518,103  | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Spring Valley                 |                   | 85,838,715   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Sweetwater                    |                   | 31,119,923   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Valle De Oro                  |                   | 99,456,813   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| Valley Center                 |                   | 72,222,071   | 0%                        | 0                       | 309   | -  | 0.25                        | -                                  | -                                    |
| <b>Total</b>                  |                   | <b>\$1,219,745,635</b>   | <b>--</b>                 | <b>\$0</b>              | <b>--</b>                                       | <b>-</b>                                   | <b>--</b>                   | <b>-</b>                           | <b>-</b>                             |

<sup>1</sup> Assumed percentage of resident expenditures that will occur within CPA.

<sup>2</sup> Based on ERA knowledge of local retail market, reported in 2001 dollars.

<sup>3</sup> Estimated buying power divided by average sales per square foot.

<sup>4</sup> Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup> Net acreage equal to 85% of gross acreage.

<sup>6</sup> Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table A-8  
Supportable Square Feet of Retail Space Outside of Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Buying Power: Non-Center (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales Per Sq. Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>5</sup> |
|-------------------------------|-------------------|---|---------------------------|-------------------------|---|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$124,550,235                               | 90%                       | \$112,095,211           | \$245   | 456,661                                    | 0.25                        | 41.93                              | 49.33                                |
| Barona                        |                   | n/a   | 90%                       | n/a                     | 245   | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 58,226,349                                  | 90%                       | 52,403,714              | 245   | 213,486                                    | 0.25                        | 19.60                              | 23.06                                |
| Central Mountain              |                   | 354,414                                     | 90%                       | 318,973                 | 245   | 1,299                                      | 0.16                        | 0.19                               | 0.22                                 |
| Central Mountain              | Cuyamaca          | 1,751,464                                   | 90%                       | 1,576,318               | 245   | 6,422                                      | 0.16                        | 0.92                               | 1.08                                 |
| Central Mountain              | Descanso          | 5,728,315                                   | 90%                       | 5,155,484               | 245   | 21,003                                     | 0.16                        | 3.01                               | 3.55                                 |
| Central Mountain              | Pine Valley       | 6,966,909                                   | 90%                       | 6,270,218               | 245   | 25,544                                     | 0.16                        | 3.67                               | 4.31                                 |
| County Islands                |                   | 9,965,587                                   | 90%                       | 8,969,028               | 245   | 36,539                                     | 0.25                        | 3.36                               | 3.95                                 |
| Crest/Dehesa                  |                   | 36,162,545                                  | 90%                       | 32,546,290              | 245   | 132,589                                    | 0.25                        | 12.18                              | 14.32                                |
| Desert                        |                   | 3,969,947                                   | 90%                       | 3,572,952               | 245   | 14,556                                     | 0.16                        | 2.09                               | 2.46                                 |
| Desert                        | Borrego Springs   | 41,942,087                                  | 90%                       | 37,747,878              | 245   | 153,780                                    | 0.16                        | 22.06                              | 25.96                                |
| Fallbrook                     |                   | 179,845,944                                 | 90%                       | 161,861,349             | 245   | 659,402                                    | 0.25                        | 60.55                              | 71.24                                |
| Jamul-Dulzura                 |                   | 72,107,920                                  | 90%                       | 64,897,128              | 245   | 264,383                                    | 0.25                        | 24.28                              | 28.56                                |
| Julian                        |                   | 13,076,303                                  | 90%                       | 11,768,673              | 245   | 47,944                                     | 0.16                        | 6.88                               | 8.09                                 |
| Lakeside <sup>6</sup>         |                   | 219,695,296                                 | 90%                       | 197,725,767             | 245   | 805,509                                    | 0.25                        | 73.97                              | 87.02                                |
| Mountain Empire               |                   | 512,020                                     | 90%                       | 460,818                 | 245   | 1,877                                      | 0.16                        | 0.27                               | 0.32                                 |
| Mountain Empire               | Boulevard         | 5,834,550                                   | 90%                       | 5,251,095               | 245   | 21,392                                     | 0.16                        | 3.07                               | 3.61                                 |
| Mountain Empire               | Jacumba           | 7,826,672                                   | 90%                       | 7,044,005               | 245   | 28,696                                     | 0.16                        | 4.12                               | 4.84                                 |
| Mountain Empire               | Lake Morena/Campo | 10,048,484                                  | 90%                       | 9,043,635               | 245   | 36,843                                     | 0.16                        | 5.29                               | 6.22                                 |
| Mountain Empire               | Potrero           | 4,258,320                                   | 90%                       | 3,832,488               | 245   | 15,613                                     | 0.16                        | 2.24                               | 2.64                                 |
| Mountain Empire               | Tecate            | 924,425                                     | 90%                       | 831,983                 | 245   | 3,389                                      | 0.16                        | 0.49                               | 0.57                                 |
| North County Metro            |                   | 173,416,945                                 | 90%                       | 156,075,251             | 245   | 635,831                                    | 0.25                        | 58.39                              | 68.69                                |
| North County Metro            | Hidden Meadows    | 35,004,909                                  | 90%                       | 31,504,418              | 245   | 128,345                                    | 0.25                        | 11.79                              | 13.87                                |
| North County Metro            | Twin Oaks         | 11,428,907                                  | 90%                       | 10,286,016              | 245   | 41,904                                     | 0.25                        | 3.85                               | 4.53                                 |
| North Mountain                | North Mountain    | 13,377,505                                  | 90%                       | 12,039,754              | 245   | 49,048                                     | 0.16                        | 7.04                               | 8.28                                 |
| North Mountain                | Palomar Mountain  | 1,517,944                                   | 90%                       | 1,366,149               | 245   | 5,566                                      | 0.16                        | 0.80                               | 0.94                                 |
| Otay                          |                   | 20,885,052                                  | 90%                       | 18,796,547              | 245   | 76,575                                     | 0.16                        | 10.99                              | 12.93                                |
| Pala-Pauma                    | Pala-Pauma        | 26,815,176                                  | 90%                       | 24,133,659              | 245   | 98,317                                     | 0.25                        | 9.03                               | 10.62                                |
| Pendleton-De Luz              |                   | 42,062,548                                  | 90%                       | 37,856,293              | 245   | 154,222                                    | 0.25                        | 14.16                              | 16.66                                |
| Rainbow                       |                   | 8,790,365                                   | 90%                       | 7,911,328               | 245   | 32,230                                     | 0.25                        | 2.96                               | 3.48                                 |
| Ramona                        |                   | 146,846,231                                 | 90%                       | 132,161,608             | 245   | 538,409                                    | 0.25                        | 49.44                              | 58.17                                |
| San Dieguito                  |                   | 185,450,547                                 | 90%                       | 166,905,492             | 245   | 679,952                                    | 0.25                        | 62.44                              | 73.46                                |
| Spring Valley                 |                   | 135,458,591                                 | 90%                       | 121,912,732             | 245   | 496,657                                    | 0.25                        | 45.61                              | 53.65                                |
| Sweetwater                    |                   | 49,109,087                                  | 90%                       | 44,198,178              | 245   | 180,058                                    | 0.25                        | 16.53                              | 19.45                                |
| Valle De Oro                  |                   | 156,948,758                                 | 90%                       | 141,253,883             | 245   | 575,450                                    | 0.25                        | 52.84                              | 62.17                                |
| Valley Center                 |                   | 113,970,718                                 | 90%                       | 102,573,646             | 245   | 417,872                                    | 0.25                        | 38.37                              | 45.14                                |
| <b>Total</b>                  |                   | <b>\$1,924,831,069</b>                      | <b>--</b>                 | <b>\$1,732,347,962</b>  | <b>--</b>                                       | <b>7,057,363</b>                           | <b>--</b>                   | <b>674.38</b>                      | <b>793.39</b>                        |

<sup>1</sup>Assumed percentage of resident expenditures that will occur within CPA if retail is made available.

<sup>2</sup>80% of average sales per sq. ft. for neighborhood centers reported by ULI Dollars & Cents of Shopping Centers 2000 for the western United States, reported in 2001 dollars.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table A-9**  
**Total Resident Supported Retail Acres for Neighborhood, Community & Non-Center Outlets**

| <b>Community Planning Area (CPA)</b> | <b>Subarea Group</b> | <b>Estimated Net Acreage<sup>1</sup></b> | <b>Estimated Gross Acreage<sup>2</sup></b> |
|--------------------------------------|----------------------|--|--|
| Alpine                               |                      | 74.43                                    | 87.56                                      |
| Barona                               |                      | n/a                                      | n/a  |
| Bonsall                              | Bonsall              | 34.80                                    | 40.94                                      |
| Central Mountain                     |                      | 0.33                                     | 0.39                                       |
| Central Mountain                     | Cuyamaca             | 1.64                                     | 1.92                                       |
| Central Mountain                     | Descanso             | 5.35                                     | 6.29                                       |
| Central Mountain                     | Pine Valley          | 6.51                                     | 7.65                                       |
| County Islands                       |                      | 5.96                                     | 7.01                                       |
| Crest/Dehesa                         |                      | 21.61                                    | 25.42                                      |
| Desert                               |                      | 3.71                                     | 4.36                                       |
| Desert                               | Borrego Springs      | 39.16                                    | 46.07                                      |
| Fallbrook                            |                      | 107.47                                   | 126.44                                     |
| Jamul-Dulzura                        |                      | 43.09                                    | 50.70                                      |
| Julian                               |                      | 12.21                                    | 14.36                                      |
| Lakeside <sup>3</sup>                |                      | 131.29                                   | 154.46                                     |
| Mountain Empire                      |                      | 0.48                                     | 0.56                                       |
| Mountain Empire                      | Boulevard            | 5.45                                     | 6.41                                       |
| Mountain Empire                      | Jacumba              | 7.31                                     | 8.60                                       |
| Mountain Empire                      | Lake Morena/Campo    | 9.38                                     | 11.04                                      |
| Mountain Empire                      | Potrero              | 3.98                                     | 4.68                                       |
| Mountain Empire                      | Tecate               | 0.86                                     | 1.02                                       |
| North County Metro                   |                      | 103.63                                   | 121.92                                     |
| North County Metro                   | Hidden Meadows       | 20.92                                    | 24.61                                      |
| North County Metro                   | Twin Oaks            | 6.83                                     | 8.04                                       |
| North Mountain                       | North Mountain       | 12.49                                    | 14.70                                      |
| North Mountain                       | Palomar Mountain     | 1.42                                     | 1.67                                       |
| Otay                                 |                      | 19.50                                    | 22.94                                      |
| Pala-Pauma                           | Pala-Pauma           | 16.02                                    | 18.85                                      |
| Pendleton-De Luz                     |                      | 25.14                                    | 29.57                                      |
| Rainbow                              |                      | 5.25                                     | 6.18                                       |
| Ramona                               |                      | 87.75                                    | 103.24                                     |
| San Dieguito                         |                      | 110.82                                   | 130.38                                     |
| Spring Valley                        |                      | 80.95                                    | 95.23                                      |
| Sweetwater                           |                      | 29.35                                    | 34.53                                      |
| Valle De Oro                         |                      | 93.79                                    | 110.34                                     |
| Valley Center                        |                      | 68.11                                    | 80.13                                      |
| <b>Total</b>                         |                      | <b>1,196.97</b>                          | <b>1,408.20</b>                            |

<sup>1</sup>Based on an estimated Floor Area Ratio (FAR) of 0.25

<sup>2</sup>Net acreage equal to 85% of gross acreage.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

Table A-10

Comparison: Retail Land Developed As of 2002 & Estimated Resident Supported Retail Acres at Build-out

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Currently Developed Retail Acres with Estimated Resident Supported Acres at Build-out <sup>1</sup> |                   |
|-------------------------------|-------------------|---|--|-------------------|
|                               |                   |   | 2002 Currently Developed Retail Acres  | Surplus/(Deficit) |
| Alpine                        |                   | 87.56   | 83.04  | (4.52)            |
| Barona                        |                   | n/a   | n/a  | n/a               |
| Bonsall                       | Bonsall           | 40.94   | 28.31  | (12.63)           |
| Central Mountain              |                   | 0.39  | 0.00   | (0.39)            |
| Central Mountain              | Cuyamaca          | 1.92  | 1.48   | (0.44)            |
| Central Mountain              | Descanso          | 6.29  | 4.85   | (1.44)            |
| Central Mountain              | Pine Valley       | 7.65  | 16.81  | 9.16              |
| County Islands                |                   | 7.01  | 1.16   | (5.85)            |
| Crest/Dehesa                  |                   | 25.42   | 5.61   | (19.81)           |
| Desert                        |                   | 4.36  | 0.00   | (4.36)            |
| Desert                        | Borrego Springs   | 46.07   | 64.37  | 18.30             |
| Fallbrook                     |                   | 126.44  | 110.58   | (15.86)           |
| Jamul-Dulzura                 |                   | 50.70   | 22.14  | (28.56)           |
| Julian                        |                   | 14.36   | 30.67  | 16.31             |
| Lakeside <sup>3</sup>         |                   | 154.46  | 212.43   | 57.97             |
| Mountain Empire               |                   | 0.56  | 0.00   | (0.56)            |
| Mountain Empire               | Boulevard         | 6.41  | 30.41  | 24.00             |
| Mountain Empire               | Jacumba           | 8.60  | 12.67  | 4.07              |
| Mountain Empire               | Lake Morena/Campo | 11.04   | 16.44  | 5.40              |
| Mountain Empire               | Potrero           | 4.68  | 1.27   | (3.41)            |
| Mountain Empire               | Tecate            | 1.02  | 3.65   | 2.63              |
| North County Metro            |                   | 121.92  | 21.94  | (99.98)           |
| North County Metro            | Hidden Meadows    | 24.61   | 1.28   | (23.33)           |
| North County Metro            | Twin Oaks         | 8.04  | 1.06   | (6.98)            |
| North Mountain                | North Mountain    | 14.70   | 21.64  | 6.94              |
| North Mountain                | Palomar Mountain  | 1.67  | 3.45   | 1.78              |
| Otay                          |                   | 22.94   | 0.00   | (22.94)           |
| Pala-Pauma                    | Pala-Pauma        | 18.85   | 5.67   | (13.18)           |
| Pendleton-De Luz              |                   | 29.57   | 69.68  | 40.11             |
| Rainbow                       |                   | 6.18  | 6.82   | 0.64              |
| Ramona                        |                   | 103.24  | 129.69   | 26.45             |
| San Dieguito                  |                   | 130.38  | 28.33  | (102.05)          |
| Spring Valley                 |                   | 95.23   | 129.67   | 34.44             |
| Sweetwater                    |                   | 34.53   | 10.19  | (24.34)           |
| Valle De Oro                  |                   | 110.34  | 169.88   | 59.54             |
| Valley Center                 |                   | 80.13   | 27.41  | (52.72)           |
| <b>Total</b>                  |                   | <b>1,408.20</b>   | <b>1,272.60</b>  | <b>(135.60)</b>   |

<sup>1</sup>Includes only neighborhood, community, and non-center retail acres; provided by Technology Associates International Corporation.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

Table A-11

Comparison: Retail Land Planned Under Existing General Plan & Estimated Resident Supported Retail Acres at Build-out

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Current General Plan with Estimated Resident Supported Acres at Build-out <sup>1</sup> |                   |
|-------------------------------|-------------------|---|--|-------------------|
|                               |                   |   | Estimated Gross Acreage Allowed under Current GP   | Surplus/(Deficit) |
| Alpine                        |                   | 87.56   | 110.18   | 22.62             |
| Barona                        |                   | n/a   | n/a  | n/a               |
| Bonsall                       | Bonsall           | 40.94   | 125.72   | 84.78             |
| Central Mountain              |                   | 0.39  | 0.00   | (0.39)            |
| Central Mountain              | Cuyamaca          | 1.92  | 0.00   | (1.92)            |
| Central Mountain              | Descanso          | 6.29  | 5.46   | (0.83)            |
| Central Mountain              | Pine Valley       | 7.65  | 17.10  | 9.45              |
| County Islands                |                   | 7.01  | 1.10   | (5.91)            |
| Crest/Dehesa                  |                   | 25.42   | 13.68  | (11.74)           |
| Desert                        |                   | 4.36  | 0.00   | (4.36)            |
| Desert                        | Borrego Springs   | 46.07   | 333.51   | 287.44            |
| Fallbrook                     |                   | 126.44  | 236.51   | 110.07            |
| Jamul-Dulzura                 |                   | 50.70   | 87.38  | 36.68             |
| Julian                        |                   | 14.36   | 75.03  | 60.67             |
| Lakeside <sup>3</sup>         |                   | 154.46  | 380.77   | 226.32            |
| Mountain Empire               |                   | 0.56  | 28.50  | 27.94             |
| Mountain Empire               | Boulevard         | 6.41  | 121.18   | 114.77            |
| Mountain Empire               | Jacumba           | 8.60  | 18.20  | 9.60              |
| Mountain Empire               | Lake Morena/Campo | 11.04   | 48.20  | 37.16             |
| Mountain Empire               | Potrero           | 4.68  | 14.94  | 10.26             |
| Mountain Empire               | Tecate            | 1.02  | 40.23  | 39.21             |
| North County Metro            |                   | 121.92  | 36.90  | (85.02)           |
| North County Metro            | Hidden Meadows    | 24.61   | 39.30  | 14.69             |
| North County Metro            | Twin Oaks         | 8.04  | 22.60  | 14.56             |
| North Mountain                | North Mountain    | 14.70   | 13.01  | (1.69)            |
| North Mountain                | Palomar Mountain  | 1.67  | 0.00   | (1.67)            |
| Otay                          |                   | 22.94   | 111.20   | 88.26             |
| Pala-Pauma                    | Pala-Pauma        | 18.85   | 37.08  | 18.23             |
| Pendleton-De Luz              |                   | 29.57   | 0.00   | (29.57)           |
| Rainbow                       |                   | 6.18  | 31.95  | 25.77             |
| Ramona                        |                   | 103.24  | 274.25   | 171.01            |
| San Dieguito                  |                   | 130.38  | 45.05  | (85.33)           |
| Spring Valley                 |                   | 95.23   | 205.37   | 110.14            |
| Sweetwater                    |                   | 34.53   | 29.92  | (4.61)            |
| Valle De Oro                  |                   | 110.34  | 219.73   | 109.39            |
| Valley Center                 |                   | 80.13   | 100.21   | 20.08             |
| <b>Total</b>                  |                   | <b>1,408.2</b>  | <b>2,824.26</b>  | <b>1,416.06</b>   |

<sup>1</sup>Includes only neighborhood, community, and non-center retail acres; provided by Technology Associates International Corporation.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

Table A-12

Comparison: Retail Land Planned Under Proposed General Plan & Estimated Resident Supported Retail Acres at Build-out

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Proposed General Plan with Estimated Resident Supported Acres at Build-out <sup>1</sup> |                   |
|-------------------------------|-------------------|---|---|-------------------|
|                               |                   |   | Estimated Gross Acreage Allowed under Proposed GP   | Surplus/(Deficit) |
| Alpine                        |                   | 87.56   | 134.46  | 46.90             |
| Barona                        |                   | n/a   | 0.00  | n/a               |
| Bonsall                       | Bonsall           | 40.94   | 127.77  | 86.83             |
| Central Mountain              |                   | 0.39  | 0.00  | (0.39)            |
| Central Mountain              | Cuyamaca          | 1.92  | 1.98  | 0.06              |
| Central Mountain              | Descanso          | 6.29  | 6.63  | 0.34              |
| Central Mountain              | Pine Valley       | 7.65  | 19.09   | 11.44             |
| County Islands                |                   | 7.01  | 0.00  | (7.01)            |
| Crest/Dehesa                  |                   | 25.42   | 17.01   | (8.41)            |
| Desert                        |                   | 4.36  | 18.79   | 14.43             |
| Desert                        | Borrego Springs   | 46.07   | 281.51  | 235.44            |
| Fallbrook                     |                   | 126.44  | 240.18  | 113.74            |
| Jamul-Dulzura                 |                   | 50.70   | 88.28   | 37.58             |
| Julian                        |                   | 14.36   | 71.65   | 57.29             |
| Lakeside <sup>3</sup>         |                   | 154.46  | 380.77  | 226.32            |
| Mountain Empire               |                   | 0.56  | 28.50   | 27.94             |
| Mountain Empire               | Boulevard         | 6.41  | 122.17  | 115.76            |
| Mountain Empire               | Jacumba           | 8.60  | 24.50   | 15.90             |
| Mountain Empire               | Lake Morena/Campo | 11.04   | 51.39   | 40.35             |
| Mountain Empire               | Potrero           | 4.68  | 24.30   | 19.62             |
| Mountain Empire               | Tecate            | 1.02  | 54.72   | 53.70             |
| North County Metro            |                   | 121.92  | 53.55   | (68.37)           |
| North County Metro            | Hidden Meadows    | 24.61   | 2.07  | (22.54)           |
| North County Metro            | Twin Oaks         | 8.04  | 39.45   | 31.41             |
| North Mountain                | North Mountain    | 14.70   | 38.07   | 23.37             |
| North Mountain                | Palomar Mountain  | 1.67  | 1.53  | (0.14)            |
| Otay                          |                   | 22.94   | 111.20  | 88.26             |
| Pala-Pauma                    | Pala-Pauma        | 18.85   | 36.72   | 17.87             |
| Pendleton-De Luz              |                   | 29.57   | 0.00  | (29.57)           |
| Rainbow                       |                   | 6.18  | 41.22   | 35.04             |
| Ramona                        |                   | 103.24  | 336.63  | 233.39            |
| San Dieguito                  |                   | 130.38  | 44.65   | (85.73)           |
| Spring Valley                 |                   | 95.23   | 200.78  | 105.55            |
| Sweetwater                    |                   | 34.53   | 29.92   | (4.61)            |
| Valle De Oro                  |                   | 110.34  | 218.66  | 108.32            |
| Valley Center                 |                   | 80.13   | 215.53  | 135.40            |
| <b>Total</b>                  |                   | <b>1,408.20</b>   | <b>3,063.68</b>   | <b>1,655.48</b>   |

<sup>1</sup>Includes Neighborhood Commercial, Service Commercial, and Rural Commercial designated lands, two-thirds of General Commercial lands, for the July 2004 Baseline General Plan Scenario, plus an assumed share of Specific Plan Areas per County staff estimates in 2002.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

**Table A-13**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Supportable Gross Acres of Retail Space in Neighborhood Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Resident Buying Power: Neighborhood Centers (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Assumed Sales per Sq.Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>5</sup> |
|-------------------------------|-------------------|--|---------------------------|-------------------------|--|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$39,629,691   | 90%                       | \$35,666,722            | \$200  | 178,334                                    | 0.25                        | 16.38                              | 19.27                                |
| Barona                        |                   | n/a  | 90%                       | n/a                     | 200  | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 18,526,599   | 90%                       | 16,673,939              | 200  | 83,370                                     | 0.25                        | 7.66                               | 9.01                                 |
| Central Mountain              |                   | 112,768  | 90%                       | 101,492                 | 200  | 507  | 0.16                        | 0.07                               | 0.09                                 |
| Central Mountain              | Cuyamaca          | 557,285  | 90%                       | 501,557                 | 200  | 2,508                                      | 0.16                        | 0.36                               | 0.42                                 |
| Central Mountain              | Descanso          | 1,822,649  | 90%                       | 1,640,384               | 200  | 8,202                                      | 0.16                        | 1.18                               | 1.38                                 |
| Central Mountain              | Pine Valley       | 2,216,748  | 90%                       | 1,995,073               | 200  | 9,975                                      | 0.16                        | 1.43                               | 1.68                                 |
| County Islands                |                   | 3,170,874  | 90%                       | 2,853,787               | 200  | 14,269                                     | 0.25                        | 1.31                               | 1.54                                 |
| Crest/Dehesa                  |                   | 11,506,285   | 90%                       | 10,355,656              | 200  | 51,778                                     | 0.25                        | 4.75                               | 5.59                                 |
| Desert                        |                   | 1,263,167  | 90%                       | 1,136,850               | 200  | 5,684                                      | 0.16                        | 0.82                               | 0.96                                 |
| Desert                        | Borrego Springs   | 13,345,233   | 90%                       | 12,010,710              | 200  | 60,054                                     | 0.16                        | 8.62                               | 10.14                                |
| Fallbrook                     |                   | 57,223,812   | 90%                       | 51,501,431              | 200  | 257,507                                    | 0.25                        | 23.65                              | 27.82                                |
| Jamul-Dulzura                 |                   | 22,943,470   | 90%                       | 20,649,123              | 200  | 103,246                                    | 0.25                        | 9.48                               | 11.15                                |
| Julian                        |                   | 4,160,649  | 90%                       | 3,744,584               | 200  | 18,723                                     | 0.16                        | 2.69                               | 3.16                                 |
| Lakeside <sup>6</sup>         |                   | 69,903,174   | 90%                       | 62,912,857              | 200  | 314,564                                    | 0.25                        | 28.89                              | 33.98                                |
| Mountain Empire               |                   | 162,916  | 90%                       | 146,624                 | 200  | 733  | 0.16                        | 0.11                               | 0.12                                 |
| Mountain Empire               | Boulevard         | 1,856,451  | 90%                       | 1,670,806               | 200  | 8,354                                      | 0.16                        | 1.20                               | 1.41                                 |
| Mountain Empire               | Jacumba           | 2,490,309  | 90%                       | 2,241,278               | 200  | 11,206                                     | 0.16                        | 1.61                               | 1.89                                 |
| Mountain Empire               | Lake Morena/Campo | 3,197,251  | 90%                       | 2,877,526               | 200  | 14,388                                     | 0.16                        | 2.06                               | 2.43                                 |
| Mountain Empire               | Potrero           | 1,354,922  | 90%                       | 1,219,430               | 200  | 6,097                                      | 0.16                        | 0.87                               | 1.03                                 |
| Mountain Empire               | Tecate            | 294,136  | 90%                       | 264,722                 | 200  | 1,324                                      | 0.16                        | 0.19                               | 0.22                                 |
| North County Metro            |                   | 55,178,218   | 90%                       | 49,660,396              | 200  | 248,302                                    | 0.25                        | 22.80                              | 26.82                                |
| North County Metro            | Hidden Meadows    | 11,137,946   | 90%                       | 10,024,151              | 200  | 50,121                                     | 0.25                        | 4.60                               | 5.41                                 |
| North County Metro            | Twin Oaks         | 3,636,477  | 90%                       | 3,272,829               | 200  | 16,364                                     | 0.25                        | 1.50                               | 1.77                                 |
| North Mountain                | North Mountain    | 4,256,486  | 90%                       | 3,830,838               | 200  | 19,154                                     | 0.16                        | 2.75                               | 3.23                                 |
| North Mountain                | Palomar Mountain  | 482,983  | 90%                       | 434,685                 | 200  | 2,173                                      | 0.16                        | 0.31                               | 0.37                                 |
| Otay                          |                   | 6,645,256  | 90%                       | 5,980,730               | 200  | 29,904                                     | 0.16                        | 4.29                               | 5.05                                 |
| Pala-Pauma                    | Pala-Pauma        | 8,532,117  | 90%                       | 7,678,905               | 200  | 38,395                                     | 0.25                        | 3.53                               | 4.15                                 |
| Pendleton-De Luz              |                   | 13,383,562   | 90%                       | 12,045,206              | 200  | 60,226                                     | 0.25                        | 5.53                               | 6.51                                 |
| Rainbow                       |                   | 2,796,939  | 90%                       | 2,517,245               | 200  | 12,586                                     | 0.25                        | 1.16                               | 1.36                                 |
| Ramona                        |                   | 46,723,885   | 90%                       | 42,051,496              | 200  | 210,257                                    | 0.25                        | 19.31                              | 22.71                                |
| San Dieguito                  |                   | 59,007,098   | 90%                       | 53,106,388              | 200  | 265,532                                    | 0.25                        | 24.38                              | 28.69                                |
| Spring Valley                 |                   | 43,100,538   | 90%                       | 38,790,484              | 200  | 193,952                                    | 0.25                        | 17.81                              | 20.95                                |
| Sweetwater                    |                   | 15,625,647   | 90%                       | 14,063,082              | 200  | 70,315                                     | 0.25                        | 6.46                               | 7.60                                 |
| Valle De Oro                  |                   | 49,938,331   | 90%                       | 44,944,498              | 200  | 224,722                                    | 0.25                        | 20.64                              | 24.28                                |
| Valley Center                 |                   | 36,263,475   | 90%                       | 32,637,128              | 200  | 163,186                                    | 0.25                        | 14.98                              | 17.63                                |
| <b>Total</b>                  |                   | <b>\$612,447,348</b>   | <b>--</b>                 | <b>\$551,202,613</b>    | <b>--</b>                                      | <b>2,756,013</b>                           | <b>--</b>                   | <b>263.36</b>                      | <b>309.83</b>                        |

<sup>1</sup>Estimated percentage of resident expenditures that will occur within CPA.

<sup>2</sup>Assumes an average rent of \$1.33/sq.ft per month.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table A-14**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Supportable Gross Acres of Retail Space in Community Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Resident Buying Power: Community Centers (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Assumed Sales per Sq.Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>5</sup> |
|-------------------------------|-------------------|---|---------------------------|-------------------------|--|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$55,644,904  | 90%                       | \$50,080,413            | \$200  | 250,402                                    | 0.25                        | 22.99                              | 27.05                                |
| Barona                        |                   | n/a   | 90%                       | n/a                     | 200  | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 26,013,597  | 90%                       | 23,412,237              | 200  | 117,061                                    | 0.25                        | 10.75                              | 12.65                                |
| Central Mountain              |                   | 158,340   | 90%                       | 142,506                 | 200  | 713  | 0.16                        | 0.10                               | 0.12                                 |
| Central Mountain              | Cuyamaca          | 782,496   | 90%                       | 704,246                 | 200  | 3,521                                      | 0.16                        | 0.51                               | 0.59                                 |
| Central Mountain              | Descanso          | 2,559,221   | 90%                       | 2,303,299               | 200  | 11,516                                     | 0.16                        | 1.65                               | 1.94                                 |
| Central Mountain              | Pine Valley       | 3,112,583   | 90%                       | 2,801,325               | 200  | 14,007                                     | 0.16                        | 2.01                               | 2.36                                 |
| County Islands                |                   | 4,452,293   | 90%                       | 4,007,064               | 200  | 20,035                                     | 0.25                        | 1.84                               | 2.16                                 |
| Crest/Dehesa                  |                   | 16,156,222  | 90%                       | 14,540,600              | 200  | 72,703                                     | 0.25                        | 6.68                               | 7.85                                 |
| Desert                        |                   | 1,773,640   | 90%                       | 1,596,276               | 200  | 7,981                                      | 0.16                        | 1.15                               | 1.35                                 |
| Desert                        | Borrego Springs   | 18,738,330  | 90%                       | 16,864,497              | 200  | 84,322                                     | 0.16                        | 12.10                              | 14.23                                |
| Fallbrook                     |                   | 80,349,188  | 90%                       | 72,314,269              | 200  | 361,571                                    | 0.25                        | 33.20                              | 39.06                                |
| Jamul-Dulzura                 |                   | 32,215,421  | 90%                       | 28,993,879              | 200  | 144,969                                    | 0.25                        | 13.31                              | 15.66                                |
| Julian                        |                   | 5,842,057   | 90%                       | 5,257,852               | 200  | 26,289                                     | 0.16                        | 3.77                               | 4.44                                 |
| Lakeside <sup>6</sup>         |                   | 98,152,553  | 90%                       | 88,337,298              | 200  | 441,686                                    | 0.25                        | 40.56                              | 47.72                                |
| Mountain Empire               |                   | 228,753   | 90%                       | 205,878                 | 200  | 1,029                                      | 0.16                        | 0.15                               | 0.17                                 |
| Mountain Empire               | Boulevard         | 2,606,683   | 90%                       | 2,346,015               | 200  | 11,730                                     | 0.16                        | 1.68                               | 1.98                                 |
| Mountain Empire               | Jacumba           | 3,496,697   | 90%                       | 3,147,027               | 200  | 15,735                                     | 0.16                        | 2.26                               | 2.66                                 |
| Mountain Empire               | Lake Morena/Campo | 4,489,328   | 90%                       | 4,040,396               | 200  | 20,202                                     | 0.16                        | 2.90                               | 3.41                                 |
| Mountain Empire               | Potrero           | 1,902,476   | 90%                       | 1,712,228               | 200  | 8,561                                      | 0.16                        | 1.23                               | 1.45                                 |
| Mountain Empire               | Tecate            | 413,002   | 90%                       | 371,702                 | 200  | 1,859                                      | 0.16                        | 0.27                               | 0.31                                 |
| North County Metro            |                   | 77,476,925  | 90%                       | 69,729,232              | 200  | 348,646                                    | 0.25                        | 32.02                              | 37.67                                |
| North County Metro            | Hidden Meadows    | 15,639,029  | 90%                       | 14,075,126              | 200  | 70,376                                     | 0.25                        | 6.46                               | 7.60                                 |
| North County Metro            | Twin Oaks         | 5,106,055   | 90%                       | 4,595,450               | 200  | 22,977                                     | 0.25                        | 2.11                               | 2.48                                 |
| North Mountain                | North Mountain    | 5,976,624   | 90%                       | 5,378,962               | 200  | 26,895                                     | 0.16                        | 3.86                               | 4.54                                 |
| North Mountain                | Palomar Mountain  | 678,167   | 90%                       | 610,350                 | 200  | 3,052                                      | 0.16                        | 0.44                               | 0.52                                 |
| Otay                          |                   | 9,330,747   | 90%                       | 8,397,672               | 200  | 41,988                                     | 0.16                        | 6.02                               | 7.09                                 |
| Pala-Pauma                    | Pala-Pauma        | 11,980,129  | 90%                       | 10,782,116              | 200  | 53,911                                     | 0.25                        | 4.95                               | 5.82                                 |
| Pendleton-De Luz              |                   | 18,792,148  | 90%                       | 16,912,933              | 200  | 84,565                                     | 0.25                        | 7.77                               | 9.14                                 |
| Rainbow                       |                   | 3,927,243   | 90%                       | 3,534,518               | 200  | 17,673                                     | 0.25                        | 1.62                               | 1.91                                 |
| Ramona                        |                   | 65,606,013  | 90%                       | 59,045,412              | 200  | 295,227                                    | 0.25                        | 27.11                              | 31.89                                |
| San Dieguito                  |                   | 82,853,138  | 90%                       | 74,567,824              | 200  | 372,839                                    | 0.25                        | 34.24                              | 40.28                                |
| Spring Valley                 |                   | 60,518,394  | 90%                       | 54,466,555              | 200  | 272,333                                    | 0.25                        | 25.01                              | 29.42                                |
| Sweetwater                    |                   | 21,940,307  | 90%                       | 19,746,276              | 200  | 98,731                                     | 0.25                        | 9.07                               | 10.67                                |
| Valle De Oro                  |                   | 70,119,486  | 90%                       | 63,107,538              | 200  | 315,538                                    | 0.25                        | 28.97                              | 34.09                                |
| Valley Center                 |                   | 50,918,327  | 90%                       | 45,826,494              | 200  | 229,132                                    | 0.25                        | 21.04                              | 24.75                                |
| <b>Total</b>                  |                   | <b>\$859,950,519</b>  | --                        | <b>\$773,955,467</b>    | --   | <b>3,869,777</b>                           | --                          | <b>369.78</b>                      | <b>435.04</b>                        |

<sup>1</sup>Estimated percentage of resident expenditures that will occur within CPA.

<sup>2</sup>Assumes an average rent of \$1.33/sq.ft per month.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table A-15**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Supportable Gross Acres of Retail Space in Regional and Super Regional Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Resident Buying Power: Regional & Super-Regional Centers (\$2001) <sup>1</sup> | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales per Sq.Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>6</sup> |
|-------------------------------|-------------------|--|---------------------------|-------------------------|--|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$78,926,202   | 0%                        | \$0                     | \$309  | -  | 0.25                        | -                                  | -                                    |
| Barona                        |                   | n/a  | 0%                        | n/a                     | 309  | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | \$36,897,438   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Central Mountain              |                   | \$224,589  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Cuyamaca          | \$1,109,885  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Descanso          | \$3,629,974  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Pine Valley       | \$4,414,859  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| County Islands                |                   | \$6,315,090  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Crest/Dehesa                  |                   | \$22,915,832   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Desert                        |                   | \$2,515,714  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Desert                        | Borrego Springs   | \$26,578,269   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Fallbrook                     |                   | \$113,966,523  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Jamul-Dulzura                 |                   | \$45,694,046   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Julian                        |                   | \$8,286,319  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Lakeside <sup>6</sup>         |                   | \$139,218,648  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Mountain Empire               |                   | \$324,462  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Boulevard         | \$3,697,294  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Jacumba           | \$4,959,682  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Lake Morena/Campo | \$6,367,621  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Potrero           | \$2,698,454  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Tecate            | \$585,799  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| North County Metro            |                   | \$109,892,533  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| North County Metro            | Hidden Meadows    | \$22,182,251   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| North County Metro            | Twin Oaks         | \$7,242,381  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| North Mountain                |                   | \$8,477,187  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| North Mountain                | Palomar Mountain  | \$961,905  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Otay                          |                   | \$13,234,642   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Pala-Pauma                    | Pala-Pauma        | \$16,992,501   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Pendleton-De Luz              |                   | \$26,654,604   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Rainbow                       |                   | \$5,570,364  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Ramona                        |                   | \$93,054,945   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| San Dieguito                  |                   | \$117,518,103  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Spring Valley                 |                   | \$85,838,715   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Sweetwater                    |                   | \$31,119,923   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Valle De Oro                  |                   | \$99,456,813   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Valley Center                 |                   | \$72,222,071   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| <b>Total</b>                  |                   | <b>\$1,219,745,635</b>   | <b>--</b>                 | <b>\$0</b>              | <b>--</b>                                      | <b>-</b>                                   | <b>--</b>                   | <b>-</b>                           | <b>-</b>                             |

<sup>1</sup>Estimated percentage of resident expenditures likely to occur within CPA.

<sup>2</sup>Based on ERA knowledge of local retail market, reported in 2001 dollars.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table A-16**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Supportable Square Feet of Retail Space Outside of Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Resident Buying Power: Non-Center (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Assumed Sales per Sq. Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>6</sup> |
|-------------------------------|-------------------|--|---------------------------|-------------------------|---|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$124,550,235  | 90%                       | \$112,095,211           | \$200   | 560,476                                    | 0.25                        | 51.47                              | 60.55                                |
| Barona                        |                   | n/a  | 90%                       | n/a                     | \$200   | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 58,226,349   | 90%                       | 52,403,714              | \$200   | 262,019                                    | 0.25                        | 24.06                              | 28.31                                |
| Central Mountain              |                   | 354,414  | 90%                       | 318,973                 | \$200   | 1,595                                      | 0.16                        | 0.23                               | 0.27                                 |
| Central Mountain              | Cuyamaca          | 1,751,464  | 90%                       | 1,576,318               | \$200   | 7,882                                      | 0.16                        | 1.13                               | 1.33                                 |
| Central Mountain              | Descanso          | 5,728,315  | 90%                       | 5,155,484               | \$200   | 25,777                                     | 0.16                        | 3.70                               | 4.35                                 |
| Central Mountain              | Pine Valley       | 6,966,909  | 90%                       | 6,270,218               | \$200   | 31,351                                     | 0.16                        | 4.50                               | 5.29                                 |
| County Islands                |                   | 9,965,587  | 90%                       | 8,969,028               | \$200   | 44,845                                     | 0.25                        | 4.12                               | 4.84                                 |
| Crest/Dehesa                  |                   | 36,162,545   | 90%                       | 32,546,290              | \$200   | 162,731                                    | 0.25                        | 14.94                              | 17.58                                |
| Desert                        |                   | 3,969,947  | 90%                       | 3,572,952               | \$200   | 17,865                                     | 0.16                        | 2.56                               | 3.02                                 |
| Desert                        | Borrego Springs   | 41,942,087   | 90%                       | 37,747,878              | \$200   | 188,739                                    | 0.16                        | 27.08                              | 31.86                                |
| Fallbrook                     |                   | 179,845,944  | 90%                       | 161,861,349             | \$200   | 809,307                                    | 0.25                        | 74.32                              | 87.43                                |
| Jamul-Dulzura                 |                   | 72,107,920   | 90%                       | 64,897,128              | \$200   | 324,486                                    | 0.25                        | 29.80                              | 35.05                                |
| Julian                        |                   | 13,076,303   | 90%                       | 11,768,673              | \$200   | 58,843                                     | 0.16                        | 8.44                               | 9.93                                 |
| Lakeside <sup>6</sup>         |                   | 219,695,296  | 90%                       | 197,725,767             | \$200   | 988,629                                    | 0.25                        | 90.78                              | 106.80                               |
| Mountain Empire               |                   | 512,020  | 90%                       | 460,818                 | \$200   | 2,304                                      | 0.16                        | 0.33                               | 0.39                                 |
| Mountain Empire               | Boulevard         | 5,834,550  | 90%                       | 5,251,095               | \$200   | 26,255                                     | 0.16                        | 3.77                               | 4.43                                 |
| Mountain Empire               | Jacumba           | 7,826,672  | 90%                       | 7,044,005               | \$200   | 35,220                                     | 0.16                        | 5.05                               | 5.95                                 |
| Mountain Empire               | Lake Morena/Campo | 10,048,484   | 90%                       | 9,043,635               | \$200   | 45,218                                     | 0.16                        | 6.49                               | 7.63                                 |
| Mountain Empire               | Potrero           | 4,258,320  | 90%                       | 3,832,488               | \$200   | 19,162                                     | 0.16                        | 2.75                               | 3.23                                 |
| Mountain Empire               | Tecate            | 924,425  | 90%                       | 831,983                 | \$200   | 4,160                                      | 0.16                        | 0.60                               | 0.70                                 |
| North County Metro            |                   | 173,416,945  | 90%                       | 156,075,251             | \$200   | 780,376                                    | 0.25                        | 71.66                              | 84.31                                |
| North County Metro            | Hidden Meadows    | 35,004,909   | 90%                       | 31,504,418              | \$200   | 157,522                                    | 0.25                        | 14.46                              | 17.02                                |
| North County Metro            | Twin Oaks         | 11,428,907   | 90%                       | 10,286,016              | \$200   | 51,430                                     | 0.25                        | 4.72                               | 5.56                                 |
| North Mountain                | North Mountain    | 13,377,505   | 90%                       | 12,039,754              | \$200   | 60,199                                     | 0.16                        | 8.64                               | 10.16                                |
| North Mountain                | Palomar Mountain  | 1,517,944  | 90%                       | 1,366,149               | \$200   | 6,831                                      | 0.16                        | 0.98                               | 1.15                                 |
| Otay                          |                   | 20,885,052   | 90%                       | 18,796,547              | \$200   | 93,983                                     | 0.16                        | 13.48                              | 15.86                                |
| Pala-Pauma                    | Pala-Pauma        | 26,815,176   | 90%                       | 24,133,659              | \$200   | 120,668                                    | 0.25                        | 11.08                              | 13.04                                |
| Pendleton-De Luz              |                   | 42,062,548   | 90%                       | 37,856,293              | \$200   | 189,281                                    | 0.25                        | 17.38                              | 20.45                                |
| Rainbow                       |                   | 8,790,365  | 90%                       | 7,911,328               | \$200   | 39,557                                     | 0.25                        | 3.63                               | 4.27                                 |
| Ramona                        |                   | 146,846,231  | 90%                       | 132,161,608             | \$200   | 660,808                                    | 0.25                        | 60.68                              | 71.39                                |
| San Diegoito                  |                   | 185,450,547  | 90%                       | 166,905,492             | \$200   | 834,527                                    | 0.25                        | 76.63                              | 90.16                                |
| Spring Valley                 |                   | 135,458,591  | 90%                       | 121,912,732             | \$200   | 609,564                                    | 0.25                        | 55.97                              | 65.85                                |
| Sweetwater                    |                   | 49,109,087   | 90%                       | 44,198,178              | \$200   | 220,991                                    | 0.25                        | 20.29                              | 23.87                                |
| Valle De Oro                  |                   | 156,948,758  | 90%                       | 141,253,883             | \$200   | 706,269                                    | 0.25                        | 64.85                              | 76.30                                |
| Valley Center                 |                   | 113,970,718  | 90%                       | 102,573,646             | \$200   | 512,868                                    | 0.25                        | 47.10                              | 55.41                                |
| <b>Total</b>                  |                   | <b>\$1,924,831,069</b>                               | <b>--</b>                 | <b>\$1,732,347,962</b>  | <b>--</b>                                       | <b>8,661,740</b>                           | <b>--</b>                   | <b>827.69</b>                      | <b>973.75</b>                        |

<sup>1</sup>Estimated percentage of resident expenditures likely to occur within CPA.

<sup>2</sup>Assumes an average rent of \$1.33/sq.ft per month.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table A-17**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Total Supportable Retail Acres for Neighborhood, Community & Non-Center Outlets**

| Community Planning Area<br>(CPA) | Subarea Group     | Estimated Net<br>Acreage <sup>1</sup> | Estimated Gross<br>Acreage <sup>2</sup> |
|----------------------------------|-------------------|---------------------------------------|---|
| Alpine                           |                   | 90.84                                 | 106.87                                  |
| Barona                           |                   | n/a                                   | n/a                                     |
| Bonsall                          | Bonsall           | 42.47                                 | 49.96                                   |
| Central Mountain                 |                   | 0.40                                  | 0.48                                    |
| Central Mountain                 | Cuyamaca          | 2.00                                  | 2.35                                    |
| Central Mountain                 | Descanso          | 6.53                                  | 7.68                                    |
| Central Mountain                 | Pine Valley       | 7.94                                  | 9.34                                    |
| County Islands                   |                   | 7.27                                  | 8.55                                    |
| Crest/Dehesa                     |                   | 26.37                                 | 31.03                                   |
| Desert                           |                   | 4.52                                  | 5.32                                    |
| Desert                           | Borrego Springs   | 47.80                                 | 56.23                                   |
| Fallbrook                        |                   | 131.16                                | 154.31                                  |
| Jamul-Dulzura                    |                   | 52.59                                 | 61.87                                   |
| Julian                           |                   | 14.90                                 | 17.53                                   |
| Lakeside <sup>3</sup>            |                   | 160.23                                | 188.50                                  |
| Mountain Empire                  |                   | 0.58                                  | 0.69                                    |
| Mountain Empire                  | Boulevard         | 6.65                                  | 7.82                                    |
| Mountain Empire                  | Jacumba           | 8.92                                  | 10.49                                   |
| Mountain Empire                  | Lake Morena/Campo | 11.45                                 | 13.47                                   |
| Mountain Empire                  | Potrero           | 4.85                                  | 5.71                                    |
| Mountain Empire                  | Tecate            | 1.05                                  | 1.24                                    |
| North County Metro               |                   | 126.48                                | 148.80                                  |
| North County Metro               | Hidden Meadows    | 25.53                                 | 30.03                                   |
| North County Metro               | Twin Oaks         | 8.34                                  | 9.81                                    |
| North Mountain                   | North Mountain    | 15.24                                 | 17.93                                   |
| North Mountain                   | Palomar Mountain  | 1.73                                  | 2.04                                    |
| Otay                             |                   | 23.80                                 | 28.00                                   |
| Pala-Pauma                       | Pala-Pauma        | 19.56                                 | 23.01                                   |
| Pendleton-De Luz                 |                   | 30.68                                 | 36.09                                   |
| Rainbow                          |                   | 6.41                                  | 7.54                                    |
| Ramona                           |                   | 107.10                                | 126.00                                  |
| San Dieguito                     |                   | 135.25                                | 159.12                                  |
| Spring Valley                    |                   | 98.79                                 | 116.23                                  |
| Sweetwater                       |                   | 35.82                                 | 42.14                                   |
| Valle De Oro                     |                   | 114.47                                | 134.67                                  |
| Valley Center                    |                   | 83.12                                 | 97.79                                   |
| <b>Total</b>                     |                   | <b>1,460.83</b>                       | <b>1,718.62</b>                         |

<sup>1</sup>Based on an estimated Floor Area Ratio (FAR) of 0.25

<sup>2</sup>Net acreage equal to 85% of gross acreage.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table A-18**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Retail Land Comparison: Current Developed Retail Acres & Forecasted Supportable Retail Acres**

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Current Developed Retail Acres with Estimated Future Supportable Acres <sup>1</sup> |                   |
|-------------------------------|-------------------|---|---|-------------------|
|                               |                   |   | Current Developed Retail Acres  | Surplus/(Deficit) |
| Alpine                        |                   | 106.87  | 83.04   | (23.83)           |
| Barona                        |                   | n/a   | n/a   | n/a               |
| Bonsall                       | Bonsall           | 49.96   | 28.31   | (21.65)           |
| Central Mountain              |                   | 0.48  | 0.00  | (0.48)            |
| Central Mountain              | Cuyamaca          | 2.35  | 1.48  | (0.87)            |
| Central Mountain              | Descanso          | 7.68  | 4.85  | (2.83)            |
| Central Mountain              | Pine Valley       | 9.34  | 16.81   | 7.47              |
| County Islands                |                   | 8.55  | 1.16  | (7.39)            |
| Crest/Dehesa                  |                   | 31.03   | 5.61  | (25.42)           |
| Desert                        |                   | 5.32  | 0.00  | (5.32)            |
| Desert                        | Borrego Springs   | 56.23   | 64.37   | 8.14              |
| Fallbrook                     |                   | 154.31  | 110.58  | (43.73)           |
| Jamul-Dulzura                 |                   | 61.87   | 22.14   | (39.73)           |
| Julian                        |                   | 17.53   | 30.67   | 13.14             |
| Lakeside <sup>3</sup>         |                   | 188.50  | 212.43  | 23.93             |
| Mountain Empire               |                   | 0.69  | 0.00  | (0.69)            |
| Mountain Empire               | Boulevard         | 7.82  | 30.41   | 22.59             |
| Mountain Empire               | Jacumba           | 10.49   | 12.67   | 2.18              |
| Mountain Empire               | Lake Morena/Campo | 13.47   | 16.44   | 2.97              |
| Mountain Empire               | Potrero           | 5.71  | 1.27  | (4.44)            |
| Mountain Empire               | Tecate            | 1.24  | 3.65  | 2.41              |
| North County Metro            |                   | 148.80  | 21.94   | (126.86)          |
| North County Metro            | Hidden Meadows    | 30.03   | 1.28  | (28.75)           |
| North County Metro            | Twin Oaks         | 9.81  | 1.06  | (8.75)            |
| North Mountain                | North Mountain    | 17.93   | 21.64   | 3.71              |
| North Mountain                | Palomar Mountain  | 2.04  | 3.45  | 1.41              |
| Otay                          |                   | 28.00   | 0.00  | (28.00)           |
| Pala-Pauma                    | Pala-Pauma        | 23.01   | 5.67  | (17.34)           |
| Pendleton-De Luz              |                   | 36.09   | 69.68   | 33.59             |
| Rainbow                       |                   | 7.54  | 6.82  | (0.72)            |
| Ramona                        |                   | 126.00  | 129.69  | 3.69              |
| San Dieguito                  |                   | 159.12  | 28.33   | (130.79)          |
| Spring Valley                 |                   | 116.23  | 129.67  | 13.44             |
| Sweetwater                    |                   | 42.14   | 10.19   | (31.95)           |
| Valle De Oro                  |                   | 134.67  | 169.88  | 35.21             |
| Valley Center                 |                   | 97.79   | 27.41   | (70.38)           |
| <b>Total</b>                  |                   | <b>1,718.62</b>   | <b>1,272.60</b>   | <b>(446.02)</b>   |

<sup>1</sup>Includes only neighborhood, community, and non-center retail acres; provided by Technology Associates International Corporation.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

**Table A-19**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**

**Retail Land Comparison: Retail Land Allowed Under Current General Plan & Forecasted Supportable Retail Acres**

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Current General Plan with Estimated Future Supportable Acres <sup>1</sup> |                   |
|-------------------------------|-------------------|---|---|-------------------|
|                               |                   |   | Estimated Gross Acreage Allowed under Current GP  | Surplus/(Deficit) |
| Alpine                        |                   | 106.87  | 110.18  | 3.31              |
| Barona                        |                   | n/a   | n/a   | n/a               |
| Bonsall                       | Bonsall           | 49.96   | 125.72  | 75.76             |
| Central Mountain              |                   | 0.48  | 0.00  | (0.48)            |
| Central Mountain              | Cuyamaca          | 2.35  | 0.00  | (2.35)            |
| Central Mountain              | Descanso          | 7.68  | 5.46  | (2.22)            |
| Central Mountain              | Pine Valley       | 9.34  | 17.10   | 7.76              |
| County Islands                |                   | 8.55  | 1.10  | (7.45)            |
| Crest/Dehesa                  |                   | 31.03   | 13.68   | (17.35)           |
| Desert                        |                   | 5.32  | 0.00  | (5.32)            |
| Desert                        | Borrego Springs   | 56.23   | 333.51  | 277.28            |
| Fallbrook                     |                   | 154.31  | 236.51  | 82.20             |
| Jamul-Dulzura                 |                   | 61.87   | 87.38   | 25.51             |
| Julian                        |                   | 17.53   | 75.03   | 57.50             |
| Lakeside <sup>3</sup>         |                   | 188.50  | 380.77  | 192.27            |
| Mountain Empire               |                   | 0.69  | 28.50   | 27.81             |
| Mountain Empire               | Boulevard         | 7.82  | 121.18  | 113.36            |
| Mountain Empire               | Jacumba           | 10.49   | 18.20   | 7.71              |
| Mountain Empire               | Lake Morena/Campo | 13.47   | 48.20   | 34.73             |
| Mountain Empire               | Potrero           | 5.71  | 14.94   | 9.23              |
| Mountain Empire               | Tecate            | 1.24  | 40.23   | 38.99             |
| North County Metro            |                   | 148.80  | 36.90   | (111.90)          |
| North County Metro            | Hidden Meadows    | 30.03   | 39.30   | 9.27              |
| North County Metro            | Twin Oaks         | 9.81  | 22.60   | 12.79             |
| North Mountain                | North Mountain    | 17.93   | 13.01   | (4.92)            |
| North Mountain                | Palomar Mountain  | 2.04  | 0.00  | (2.04)            |
| Otay                          |                   | 28.00   | 111.20  | 83.20             |
| Pala-Pauma                    | Pala-Pauma        | 23.01   | 37.08   | 14.07             |
| Pendleton-De Luz              |                   | 36.09   | 0.00  | (36.09)           |
| Rainbow                       |                   | 7.54  | 31.95   | 24.41             |
| Ramona                        |                   | 126.00  | 274.25  | 148.25            |
| San Dieguito                  |                   | 159.12  | 45.05   | (114.07)          |
| Spring Valley                 |                   | 116.23  | 205.37  | 89.14             |
| Sweetwater                    |                   | 42.14   | 29.92   | (12.22)           |
| Valle De Oro                  |                   | 134.67  | 219.73  | 85.06             |
| Valley Center                 |                   | 97.79   | 100.21  | 2.42              |
| <b>Total</b>                  |                   | <b>1,718.6</b>  | <b>2,824.26</b>   | <b>1,105.64</b>   |

<sup>1</sup>Includes only neighborhood, community, and non-center retail acres; provided by Technology Associates International Corporation.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

**Table A-20**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**

**Retail Land Comparison: Retail Land Allowed Under Proposed General Plan & Forecasted Supportable Retail Acres**

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Proposed General Plan with Estimated Future Supportable Acres <sup>1</sup> |                   |
|-------------------------------|-------------------|---|--|-------------------|
|                               |                   |   | Estimated Gross Acreage Allowed under Proposed GP  | Surplus/(Deficit) |
| Alpine                        |                   | 106.87  | 134.46   | 27.59             |
| Barona                        |                   | n/a   | 0.00   | n/a               |
| Bonsall                       | Bonsall           | 49.96   | 127.77   | 77.81             |
| Central Mountain              |                   | 0.48  | 0.00   | (0.48)            |
| Central Mountain              | Cuyamaca          | 2.35  | 1.98   | (0.37)            |
| Central Mountain              | Descanso          | 7.68  | 6.63   | (1.05)            |
| Central Mountain              | Pine Valley       | 9.34  | 19.09  | 9.75              |
| County Islands                |                   | 8.55  | 0.00   | (8.55)            |
| Crest/Dehesa                  |                   | 31.03   | 17.01  | (14.02)           |
| Desert                        |                   | 5.32  | 18.79  | 13.47             |
| Desert                        | Borrego Springs   | 56.23   | 281.51   | 225.28            |
| Fallbrook                     |                   | 154.31  | 240.18   | 85.87             |
| Jamul-Dulzura                 |                   | 61.87   | 88.28  | 26.41             |
| Julian                        |                   | 17.53   | 71.65  | 54.12             |
| Lakeside <sup>3</sup>         |                   | 188.50  | 380.77   | 192.27            |
| Mountain Empire               |                   | 0.69  | 28.50  | 27.81             |
| Mountain Empire               | Boulevard         | 7.82  | 122.17   | 114.35            |
| Mountain Empire               | Jacumba           | 10.49   | 24.50  | 14.01             |
| Mountain Empire               | Lake Morena/Campo | 13.47   | 51.39  | 37.92             |
| Mountain Empire               | Potrero           | 5.71  | 24.30  | 18.59             |
| Mountain Empire               | Tecate            | 1.24  | 54.72  | 53.48             |
| North County Metro            |                   | 148.80  | 53.55  | (95.25)           |
| North County Metro            | Hidden Meadows    | 30.03   | 2.07   | (27.96)           |
| North County Metro            | Twin Oaks         | 9.81  | 39.45  | 29.64             |
| North Mountain                | North Mountain    | 17.93   | 38.07  | 20.14             |
| North Mountain                | Palomar Mountain  | 2.04  | 1.53   | (0.51)            |
| Otay                          |                   | 28.00   | 111.20   | 83.20             |
| Pala-Pauma                    | Pala-Pauma        | 23.01   | 36.72  | 13.71             |
| Pendleton-De Luz              |                   | 36.09   | 0.00   | (36.09)           |
| Rainbow                       |                   | 7.54  | 41.22  | 33.68             |
| Ramona                        |                   | 126.00  | 336.63   | 210.63            |
| San Dieguito                  |                   | 159.12  | 44.65  | (114.47)          |
| Spring Valley                 |                   | 116.23  | 200.78   | 84.55             |
| Sweetwater                    |                   | 42.14   | 29.92  | (12.22)           |
| Valle De Oro                  |                   | 134.67  | 218.66   | 83.99             |
| Valley Center                 |                   | 97.79   | 215.53   | 117.74            |
| <b>Total</b>                  |                   | <b>1,718.6</b>  | <b>3,063.68</b>  | <b>1,345.06</b>   |

<sup>1</sup>Includes Neighborhood Commercial, Service Commercial, and Rural Commercial designated lands, two-thirds of General Commercial lands, for the July 2004 Baseline General Plan Scenario, plus an assumed share of Specific Plan Areas per County staff estimates in 2002.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

**Table B-1**  
**Total Estimated Sales in Retail Outlets to San Diego Residents**  
**('000 of 2001 \$)**

|  | <b>'000 of 2001 Dollars</b> |
|--|-----------------------------|
| Estimated Selected Retail Expenditures <sup>1</sup>            | \$27,066,361                |
| Less: Estimated Tourism Related Spending <sup>2</sup>          | \$335,288                   |
| Less: Estimated Expenditures by Mexican Residents <sup>3</sup> | \$1,467                     |
| <b>Estimated Selected Resident Expenditures<sup>4</sup></b>    | <b>\$26,729,606</b>         |
| <br>   |                             |
| Total San Diego County Households (2000) <sup>5</sup>          | 994,677                     |
| <b>Estimated Selected Resident Expenditures Per Household</b>  | <b>\$26,873</b>             |

<sup>1</sup>Based on taxable retail sales in retail outlets San Diego County in 2000 (adjusted for inflation to 2001 dollars) plus non-taxable transactions at drug stores and food stores; Excludes new and used auto sales, and boat, motorcycle and plane dealers.

<sup>2</sup>Based on the distribution of expenditures presented in the San Diego County Visitor Profile (2000).

<sup>3</sup>An ERA estimate based on data from the 1994 San Diego Dialogue Study "Who Crosses the Border" (presented in 2001 dollars.).

<sup>4</sup>Total retail expenditures minus tourism and Mexican national-related expenditures.

<sup>5</sup>U.S. Census Bureau, 2000 Census.

Source: Economics Research Associates, State Board of Equalization and the U.S. Census Bureau.

**Table B-2**  
**Estimated Retail Sales Occurring In Shopping Centers and Outside of Shopping Centers**

**Estimated Retail Sales in Centers by Type (2001)**

|  | <b>Neighborhood</b> | <b>Community</b> | <b>Regional &amp; Super Regional</b> | <b>Total</b>     |
|--|---------------------|------------------|--------------------------------------|------------------|
| <b>GLA of Centers by Type<sup>1</sup></b>        | 14,626,771          | 20,996,191       | 23,141,056                           | 58,764,018       |
| <b>Average Sales Per Square Foot<sup>2</sup></b> | \$245               | \$240            | \$309                                | \$269            |
| <b>Estimated Total Sales</b>                     | \$3,590,385,970     | \$5,041,338,311  | \$7,150,586,304                      | \$15,782,310,585 |
| <b>% of Total Sales by Center Type</b>           | 23%                 | 32%              | 45%                                  | 100%             |

**Estimated Retail Sales Occurring Outside Centers**

|   |                  |
|---|------------------|
| <b>Estimated Retail Sales in San Diego County, 2001<sup>3</sup></b> | \$27,066,360,540 |
| <b>Estimated Retail Sales In Centers</b>                            | \$15,782,310,585 |
| <b>Retail Sales Occurring Outside of Centers</b>                    | \$11,284,049,955 |
| <b>% of Retail Sales Occurring Outside of Centers</b>               | 42%              |

**Distribution of Total Estimated Retail Sales**

| <b>Type of Outlet</b>                | <b>% of Sales</b> |
|--------------------------------------|-------------------|
| <b>Non-Center</b>                    | 42%               |
| <b>Neighborhood</b>                  | 13%               |
| <b>Community</b>                     | 19%               |
| <b>Regional &amp; Super Regional</b> | 26%               |

<sup>1</sup>The Shopping Center Directory (Interactive Market Systems, Inc.). Includes only those centers reporting size.

<sup>2</sup>Community sales per sq.ft. as reported by ULI Dollars & Cents, 2000 (reported in 2001 \$). Neighborhood sales per sq.ft. is 80% of ULI figure. Regional & Superregional figure is an ERA estimate based on local data sources and estimates.

<sup>3</sup>Total estimated sales in retail outlets only, less tourism expenditures and expenditures by non-resident Mexican nationals; excludes auto, boat, motorcycle and aircraft sales (see Table 1). Presented in 2001 \$.

Source: The Shopping Center Directory, ULI Dollars & Cents (2000), California State Board of Equalization and Economics Research Associates

**Table B-3**  
**Buying Power by CPA<sup>1</sup>**

| Community Planning Area (CPA)         | Sponsor Group     | Estimated Build-out           | Estimated Build-out                    | Estimated Build-out               | Estimated Build-out         | Estimated Build-out     | 2030 Median                  | Estimated 2030                    | Estimated % of                            | Estimated Annual                    | Estimated CPA Resident |
|---------------------------------------|-------------------|-------------------------------|--|-----------------------------------|-----------------------------|-------------------------|------------------------------|-----------------------------------|---|-------------------------------------|------------------------|
|                                       |                   | Total Population <sup>1</sup> | Group Quarters Population <sup>1</sup> | Household Population <sup>1</sup> | Household Size <sup>1</sup> | Households <sup>1</sup> | Income (\$2001) <sup>2</sup> | Mean Income (\$2001) <sup>3</sup> | Income Spent on Retail Items <sup>4</sup> | Expenditures Per Household (\$2001) | Buying Power (\$2001)  |
| Alpine                                |                   | 28,632                        | 498                                    | 28,134                            | 2.908                       | 9,675                   | \$89,389                     | \$136,765                         | 22%                                       | \$30,088                            | \$291,094,463          |
| Barona                                |                   | 537                           | 2                                      | 535                               | 3.636                       | 147                     | n/a                          | n/a                               | n/a                                       | n/a                                 | n/a                    |
| Bonsall                               | Bonsall           | 15,196                        | 65                                     | 15,131                            | 2.907                       | 5,205                   | 79,047                       | 127,265                           | 22%                                       | 27,998                              | 145,731,724            |
| Central Mountain                      |                   | 203                           | 0                                      | 203                               | 2.875                       | 71                      | 70,780                       | 57,332                            | 29%                                       | 16,626                              | 1,173,964              |
| Central Mountain                      | Cuyamaca          | 615                           | 0                                      | 615                               | 2.426                       | 254                     | 70,780                       | 57,332                            | 29%                                       | 16,626                              | 4,214,837              |
| Central Mountain                      | Descanso          | 2,740                         | 500                                    | 2,240                             | 2.696                       | 831                     | 70,780                       | 57,332                            | 29%                                       | 16,626                              | 13,814,164             |
| Central Mountain                      | Pine Valley       | 2,760                         | 0                                      | 2,760                             | 2.746                       | 1,005                   | 70,780                       | 57,332                            | 29%                                       | 16,626                              | 16,711,099             |
| County Islands                        |                   | 3,140                         | 1                                      | 3,139                             | 3.476                       | 903                     | 93,999                       | 120,319                           | 22%                                       | 26,470                              | 23,903,844             |
| Crest/Dehesa                          |                   | 11,194                        | 85                                     | 11,109                            | 3.026                       | 3,671                   | 98,298                       | 108,128                           | 22%                                       | 23,788                              | 87,330,477             |
| Desert                                |                   | 1,777                         | 71                                     | 1,706                             | 2.369                       | 720                     | 47,494                       | 76,465                            | 22%                                       | 16,822                              | 12,114,341             |
| Desert                                | Borrego Springs   | 14,453                        | 10                                     | 14,443                            | 2.345                       | 6,159                   | 47,494                       | 76,465                            | 22%                                       | 16,822                              | 103,609,698            |
| Fallbrook                             |                   | 61,157                        | 376                                    | 60,781                            | 3.065                       | 19,831                  | 70,826                       | 99,157                            | 22%                                       | 21,814                              | 432,595,405            |
| Jamul-Dulzura                         |                   | 21,556                        | 81                                     | 21,475                            | 3.194                       | 6,724                   | 98,975                       | 117,780                           | 22%                                       | 25,912                              | 174,218,312            |
| Julian                                |                   | 4,314                         | 47                                     | 4,267                             | 2.575                       | 1,657                   | 63,584                       | 94,740                            | 22%                                       | 20,843                              | 34,538,285             |
| Lakeside <sup>5</sup>                 |                   | 87,871                        | 741                                    | 87,130                            | 2.983                       | 29,209                  | 68,920                       | 82,015                            | 22%                                       | 18,043                              | 527,024,110            |
| Mountain Empire                       |                   | 243                           | 0                                      | 243                               | 2.881                       | 84                      | 49,481                       | 67,294                            | 22%                                       | 14,805                              | 1,248,705              |
| Mountain Empire                       | Boulevard         | 2,841                         | 179                                    | 2,662                             | 2.816                       | 945                     | 49,481                       | 67,294                            | 22%                                       | 14,805                              | 13,994,979             |
| Mountain Empire                       | Jacumba           | 3,420                         | 0                                      | 3,420                             | 2.697                       | 1,268                   | 49,481                       | 67,294                            | 22%                                       | 14,805                              | 18,773,360             |
| Mountain Empire                       | Lake Morena/Campo | 4,966                         | 300                                    | 4,666                             | 2.866                       | 1,628                   | 49,481                       | 67,294                            | 22%                                       | 14,805                              | 24,102,683             |
| Mountain Empire                       | Potrero           | 2,234                         | 0                                      | 2,234                             | 3.238                       | 690                     | 49,481                       | 67,294                            | 22%                                       | 14,805                              | 10,214,172             |
| Mountain Empire                       | Tecate            | 433                           | 0                                      | 433                               | 2.891                       | 150                     | 49,481                       | 67,294                            | 22%                                       | 14,805                              | 2,217,362              |
| North County Metro                    |                   | 66,827                        | 550                                    | 66,277                            | 3.146                       | 21,067                  | 81,787                       | 92,419                            | 22%                                       | 20,332                              | 428,341,058            |
| North County Metro                    | Hidden Meadows    | 11,383                        | 77                                     | 11,306                            | 2.716                       | 4,163                   | 81,787                       | 92,419                            | 22%                                       | 20,332                              | 84,637,884             |
| North County Metro                    | Twin Oaks         | 4,231                         | 8                                      | 4,223                             | 2.986                       | 1,414                   | 81,787                       | 92,419                            | 22%                                       | 20,332                              | 28,755,231             |
| North Mountain                        | North Mountain    | 6,986                         | 152                                    | 6,834                             | 2.571                       | 2,658                   | 47,814                       | 55,464                            | 29%                                       | 16,085                              | 42,754,541             |
| North Mountain                        | Palomar Mountain  | 689                           | 0                                      | 689                               | 2.306                       | 299                     | 47,814                       | 55,464                            | 29%                                       | 16,085                              | 4,805,840              |
| Otay                                  |                   | 13,484                        | 8,071                                  | 5,413                             | 2.888                       | 1,874                   | 94,913                       | 121,489                           | 22%                                       | 26,728                              | 50,095,697             |
| Pala-Pauma                            | Pala-Pauma        | 14,420                        | 132                                    | 14,288                            | 3.521                       | 4,058                   | 64,123                       | 82,077                            | 22%                                       | 18,057                              | 73,274,044             |
| Pendleton-De Luz                      |                   | 38,341                        | 16,175                                 | 22,166                            | 3.556                       | 6,233                   | 50,282                       | 55,813                            | 29%                                       | 16,186                              | 100,892,862            |
| Rainbow                               |                   | 3,532                         | 8                                      | 3,524                             | 2.896                       | 1,217                   | 65,959                       | 60,022                            | 29%                                       | 17,406                              | 21,181,079             |
| Ramona                                |                   | 53,843                        | 266                                    | 53,577                            | 3.221                       | 16,634                  | 80,866                       | 97,040                            | 22%                                       | 21,349                              | 355,107,621            |
| San Diegoito                          |                   | 32,977                        | 8                                      | 32,969                            | 2.850                       | 11,568                  | 138,193                      | 178,269                           | 22%                                       | 39,219                              | 453,691,061            |
| Spring Valley                         |                   | 66,862                        | 388                                    | 66,474                            | 3.232                       | 20,567                  | 65,279                       | 71,807                            | 22%                                       | 15,798                              | 324,916,238            |
| Sweetwater                            |                   | 15,276                        | 155                                    | 15,121                            | 3.155                       | 4,793                   | 94,676                       | 111,718                           | 22%                                       | 24,578                              | 117,794,963            |
| Valle De Oro                          |                   | 42,851                        | 225                                    | 42,626                            | 2.948                       | 14,459                  | 92,458                       | 118,346                           | 22%                                       | 26,036                              | 376,463,388            |
| Valley Center                         |                   | 42,063                        | 99                                     | 41,964                            | 3.082                       | 13,616                  | 74,601                       | 93,997                            | 22%                                       | 20,679                              | 281,567,173            |
| <b>Community Planning Areas Total</b> |                   | <b>684,047</b>                | <b>29,270</b>                          | <b>654,777</b>                    | <b>--</b>                   | <b>215,446</b>          | <b>--</b>                    | <b>--</b>                         | <b>--</b>                                 | <b>--</b>                           | <b>\$4,682,904,662</b> |

<sup>1</sup>Under Proposed General Plan population and size assumptions for the July 2004 Baseline scenario provided by the County.

<sup>2</sup>Based on SANDAG 2030 Cities/County Forecast (presented in § 2001).

<sup>3</sup>ERA estimate based on current relationship between median and mean incomes (as reported by SANDAG and Census data).

<sup>4</sup>Based on ratios of expenditures to income reported in "Consumer Expenditures in 2000", Bureau of Labor Statistics.

<sup>5</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

<sup>6</sup>Including incorporated areas.

Sources: Technology Associates International Corporation, State of California Board of Equalization, and Economics Research Associates.

**Table B-4  
Resident Buying Power by Type of Center**

| Community Planning Area (CPA) | Subarea Group     | Estimated Buying Power by Type of Center (\$2001) <sup>1</sup> |                      |                      |                           |                        |
|-------------------------------|-------------------|--|----------------------|----------------------|---------------------------|------------------------|
|                               |                   | Estimated CPA Resident Buying Power (\$2001)                   | 13%                  | 19%                  | 26%                       | 42%                    |
|                               |                   |  | Neighborhood         | Community            | Regional & Super Regional | Non-Center             |
| Alpine                        |                   | \$291,094,463  | \$38,614,038         | \$54,218,803         | \$76,903,434              | \$121,358,188          |
| Barona                        |                   | n/a  | n/a                  | n/a                  | n/a                       | n/a                    |
| Bonsall                       | Bonsall           | 145,731,724  | 19,331,492           | 27,143,765           | 38,500,458                | 60,756,009             |
| Central Mountain              |                   | 1,173,964  | 155,728              | 218,661              | 310,146                   | 489,429                |
| Central Mountain              | Cuyamaca          | 4,214,837  | 559,103              | 785,049              | 1,113,506                 | 1,757,179              |
| Central Mountain              | Descanso          | 13,814,164   | 1,832,466            | 2,573,005            | 3,649,525                 | 5,759,168              |
| Central Mountain              | Pine Valley       | 16,711,099   | 2,216,748            | 3,112,583            | 4,414,859                 | 6,966,909              |
| County Islands                |                   | 23,903,844   | 3,170,874            | 4,452,293            | 6,315,090                 | 9,965,587              |
| Crest/Dehesa                  |                   | 87,330,477   | 11,584,495           | 16,266,039           | 23,071,595                | 36,408,348             |
| Desert                        |                   | 12,114,341   | 1,606,982            | 2,256,398            | 3,200,454                 | 5,050,507              |
| Desert                        | Borrego Springs   | 103,609,698  | 13,743,954           | 19,298,182           | 27,372,357                | 43,195,206             |
| Fallbrook                     |                   | 432,595,405  | 57,384,312           | 80,574,549           | 114,286,173               | 180,350,371            |
| Jamul-Dulzura                 |                   | 174,218,312  | 23,110,273           | 32,449,632           | 46,026,250                | 72,632,156             |
| Julian                        |                   | 34,538,285   | 4,581,546            | 6,433,047            | 9,124,573                 | 14,399,119             |
| Lakeside <sup>2</sup>         |                   | 527,024,110  | 69,910,396           | 98,162,693           | 139,233,030               | 219,717,992            |
| Mountain Empire               |                   | 1,248,705  | 165,642              | 232,582              | 329,892                   | 520,589                |
| Mountain Empire               | Boulevard         | 13,994,979   | 1,856,451            | 2,606,683            | 3,697,294                 | 5,834,550              |
| Mountain Empire               | Jacumba           | 18,773,360   | 2,490,309            | 3,496,697            | 4,959,682                 | 7,826,672              |
| Mountain Empire               | Lake Morena/Campo | 24,102,683   | 3,197,251            | 4,489,328            | 6,367,621                 | 10,048,484             |
| Mountain Empire               | Potrero           | 10,214,172   | 1,354,922            | 1,902,476            | 2,698,454                 | 4,258,320              |
| Mountain Empire               | Tecate            | 2,217,362  | 294,136              | 413,002              | 585,799                   | 924,425                |
| North County Metro            |                   | 428,341,058  | 56,819,967           | 79,782,141           | 113,162,229               | 178,576,720            |
| North County Metro            | Hidden Meadows    | 84,637,884   | 11,227,319           | 15,764,521           | 22,360,246                | 35,285,797             |
| North County Metro            | Twin Oaks         | 28,755,231   | 3,814,417            | 5,355,905            | 7,596,764                 | 11,988,145             |
| North Mountain                | North Mountain    | 42,754,541   | 5,671,442            | 7,963,394            | 11,295,203                | 17,824,501             |
| North Mountain                | Palomar Mountain  | 4,805,840  | 637,501              | 895,128              | 1,269,641                 | 2,003,569              |
| Otay                          |                   | 50,095,697   | 6,645,256            | 9,330,747            | 13,234,642                | 20,885,052             |
| Pala-Pauma                    | Pala-Pauma        | 73,274,044   | 9,719,892            | 13,647,910           | 19,358,065                | 30,548,177             |
| Pendleton-De Luz              |                   | 100,892,862  | 13,383,562           | 18,792,148           | 26,654,604                | 42,062,548             |
| Rainbow                       |                   | 21,181,079   | 2,809,696            | 3,945,155            | 5,595,770                 | 8,830,458              |
| Ramona                        |                   | 355,107,621  | 47,105,462           | 66,141,794           | 93,814,892                | 148,045,472            |
| San Dieguito                  |                   | 453,691,061  | 60,182,676           | 84,503,793           | 119,859,376               | 189,145,215            |
| Spring Valley                 |                   | 324,916,238  | 43,100,538           | 60,518,394           | 85,838,715                | 135,458,591            |
| Sweetwater                    |                   | 117,794,963  | 15,625,647           | 21,940,307           | 31,119,923                | 49,109,087             |
| Valle De Oro                  |                   | 376,463,388  | 49,938,331           | 70,119,486           | 99,456,813                | 156,948,758            |
| Valley Center                 |                   | 281,567,173  | 37,350,231           | 52,444,265           | 74,386,446                | 117,386,231            |
| <b>Total</b>                  |                   | <b>\$4,682,904,662</b>   | <b>\$621,193,055</b> | <b>\$872,230,555</b> | <b>\$1,237,163,522</b>    | <b>\$1,952,317,530</b> |

<sup>1</sup>Based on distribution established in Table 2.

<sup>2</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA.

Sources: Technology Associates International Corporation, California State Board of Equalization, and Economics Research Associates.

**Table B-5  
Resident Supported Gross Acres of Retail Space in Neighborhood Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Buying Power:<br>Neighborhood Centers<br>(\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales per Sq.Ft.<br>(\$2001) <sup>2</sup> | Estimated Supportable Sq.<br>Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross<br>Acreage <sup>6</sup> |
|-------------------------------|-------------------|---|---------------------------|-------------------------|---|---|-----------------------------|------------------------------------|---|
| Alpine                        |                   | \$38,614,038  | 90%                       | \$34,752,634            | \$245   | 141,578                                       | 0.25                        | 13.00                              | 15.29                                   |
| Barona                        |                   | n/a   | 90%                       | n/a                     | 245   | n/a   | 0.25                        | n/a                                | n/a                                     |
| Bonsall                       | Bonsall           | 19,331,492  | 90%                       | 17,398,343              | 245   | 70,879  | 0.25                        | 6.51                               | 7.66                                    |
| Central Mountain              |                   | 155,728   | 90%                       | 140,155                 | 245   | 571   | 0.16                        | 0.08                               | 0.10                                    |
| Central Mountain              | Cuyamaca          | 559,103   | 90%                       | 503,193                 | 245   | 2,050   | 0.16                        | 0.29                               | 0.35                                    |
| Central Mountain              | Descanso          | 1,832,466   | 90%                       | 1,649,219               | 245   | 6,719   | 0.16                        | 0.96                               | 1.13                                    |
| Central Mountain              | Pine Valley       | 2,216,748   | 90%                       | 1,995,073               | 245   | 8,128   | 0.16                        | 1.17                               | 1.37                                    |
| County Islands                |                   | 3,170,874   | 90%                       | 2,853,787               | 245   | 11,626  | 0.25                        | 1.07                               | 1.26                                    |
| Crest/Dehesa                  |                   | 11,584,495  | 90%                       | 10,426,045              | 245   | 42,474  | 0.25                        | 3.90                               | 4.59                                    |
| Desert                        |                   | 1,606,982   | 90%                       | 1,446,284               | 245   | 5,892   | 0.16                        | 0.85                               | 0.99                                    |
| Desert                        | Borrego Springs   | 13,743,954  | 90%                       | 12,369,558              | 245   | 50,392  | 0.16                        | 7.23                               | 8.51                                    |
| Fallbrook                     |                   | 57,384,312  | 90%                       | 51,645,881              | 245   | 210,399                                       | 0.25                        | 19.32                              | 22.73                                   |
| Jamul-Dulzura                 |                   | 23,110,273  | 90%                       | 20,799,246              | 245   | 84,733  | 0.25                        | 7.78                               | 9.15                                    |
| Julian                        |                   | 4,581,546   | 90%                       | 4,123,391               | 245   | 16,798  | 0.16                        | 2.41                               | 2.84                                    |
| Lakeside <sup>6</sup>         |                   | 69,910,396  | 90%                       | 62,919,356              | 245   | 256,325                                       | 0.25                        | 23.54                              | 27.69                                   |
| Mountain Empire               |                   | 165,642   | 90%                       | 149,078                 | 245   | 607   | 0.16                        | 0.09                               | 0.10                                    |
| Mountain Empire               | Boulevard         | 1,856,451   | 90%                       | 1,670,806               | 245   | 6,807   | 0.16                        | 0.98                               | 1.15                                    |
| Mountain Empire               | Jacumba           | 2,490,309   | 90%                       | 2,241,278               | 245   | 9,131   | 0.16                        | 1.31                               | 1.54                                    |
| Mountain Empire               | Lake Morena/Campo | 3,197,251   | 90%                       | 2,877,526               | 245   | 11,723  | 0.16                        | 1.68                               | 1.98                                    |
| Mountain Empire               | Potrero           | 1,354,922   | 90%                       | 1,219,430               | 245   | 4,968   | 0.16                        | 0.71                               | 0.84                                    |
| Mountain Empire               | Tecate            | 294,136   | 90%                       | 264,722                 | 245   | 1,078   | 0.16                        | 0.15                               | 0.18                                    |
| North County Metro            |                   | 56,819,967  | 90%                       | 51,137,971              | 245   | 208,330                                       | 0.25                        | 19.13                              | 22.51                                   |
| North County Metro            | Hidden Meadows    | 11,227,319  | 90%                       | 10,104,587              | 245   | 41,165  | 0.25                        | 3.78                               | 4.45                                    |
| North County Metro            | Twin Oaks         | 3,814,417   | 90%                       | 3,432,975               | 245   | 13,985  | 0.25                        | 1.28                               | 1.51                                    |
| North Mountain                |                   | 5,671,442   | 90%                       | 5,104,298               | 245   | 20,794  | 0.16                        | 2.98                               | 3.51                                    |
| North Mountain                | Palomar Mountain  | 637,501   | 90%                       | 573,750                 | 245   | 2,337   | 0.16                        | 0.34                               | 0.39                                    |
| Otay                          |                   | 6,645,256   | 90%                       | 5,980,730               | 245   | 24,365  | 0.16                        | 3.50                               | 4.11                                    |
| Pala-Pauma                    | Pala-Pauma        | 9,719,892   | 90%                       | 8,747,903               | 245   | 35,638  | 0.25                        | 3.27                               | 3.85                                    |
| Pendleton-De Luz              |                   | 13,383,562  | 90%                       | 12,045,206              | 245   | 49,071  | 0.25                        | 4.51                               | 5.30                                    |
| Rainbow                       |                   | 2,809,696   | 90%                       | 2,528,727               | 245   | 10,302  | 0.25                        | 0.95                               | 1.11                                    |
| Ramona                        |                   | 47,105,462  | 90%                       | 42,394,916              | 245   | 172,711                                       | 0.25                        | 15.86                              | 18.66                                   |
| San Dieguito                  |                   | 60,182,676  | 90%                       | 54,164,409              | 245   | 220,659                                       | 0.25                        | 20.26                              | 23.84                                   |
| Spring Valley                 |                   | 43,100,538  | 90%                       | 38,790,484              | 245   | 158,027                                       | 0.25                        | 14.51                              | 17.07                                   |
| Sweetwater                    |                   | 15,625,647  | 90%                       | 14,063,082              | 245   | 57,291  | 0.25                        | 5.26                               | 6.19                                    |
| Valle De Oro                  |                   | 49,938,331  | 90%                       | 44,944,498              | 245   | 183,098                                       | 0.25                        | 16.81                              | 19.78                                   |
| Valley Center                 |                   | 37,350,231  | 90%                       | 33,615,208              | 245   | 136,944                                       | 0.25                        | 12.58                              | 14.79                                   |
| <b>Total</b>                  |                   | <b>\$621,193,055</b>  | <b>--</b>                 | <b>\$559,073,750</b>    | <b>--</b>   | <b>2,277,595</b>                              | <b>--</b>                   | <b>218.05</b>                      | <b>256.53</b>                           |

<sup>1</sup> Assumed percentage of resident expenditures that will occur within CPA if retail is made available.

<sup>2</sup> 80% of average sales per sq.ft. for neighborhood centers reported by ULI Dollars & Cents of Shopping Centers 2000 for the western United States, reported in 2001 dollars.

<sup>3</sup> Estimated buying power divided by average sales per square foot.

<sup>4</sup> Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup> Net acreage equal to 85% of gross acreage.

<sup>6</sup> Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-6  
Resident Supported Gross Acres of Retail Space in Community Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Buying Power:<br>Community Centers<br>(\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales per Sq. Ft.<br>(\$2001) <sup>2</sup> | Estimated Supportable Sq.<br>Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>6</sup> |
|-------------------------------|-------------------|--|---------------------------|-------------------------|--|---|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$54,218,803   | 90%                       | \$48,796,923            | \$240  | 203,230                                       | 0.25                        | 18.66                              | 21.96                                |
| Barona                        |                   | n/a  | 90%                       | n/a                     | 240  | 0   | 0.25                        | 0                                  | 0                                    |
| Bonsall                       | Bonsall           | 27,143,765   | 90%                       | 24,429,388              | 240  | 101,744                                       | 0.25                        | 9.34                               | 10.99                                |
| Central Mountain              |                   | 218,661  | 90%                       | 196,795                 | 240  | 820   | 0.16                        | 0.12                               | 0.14                                 |
| Central Mountain              | Cuyamaca          | 785,049  | 90%                       | 706,544                 | 240  | 2,943   | 0.16                        | 0.42                               | 0.50                                 |
| Central Mountain              | Descanso          | 2,573,005  | 90%                       | 2,315,704               | 240  | 9,644   | 0.16                        | 1.38                               | 1.63                                 |
| Central Mountain              | Pine Valley       | 3,112,583  | 90%                       | 2,801,325               | 240  | 11,667  | 0.16                        | 1.67                               | 1.97                                 |
| County Islands                |                   | 4,452,293  | 90%                       | 4,007,064               | 240  | 16,689  | 0.25                        | 1.53                               | 1.80                                 |
| Crest/Dehesa                  |                   | 16,266,039   | 90%                       | 14,639,435              | 240  | 60,970  | 0.25                        | 5.60                               | 6.59                                 |
| Desert                        |                   | 2,256,398  | 90%                       | 2,030,759               | 240  | 8,458   | 0.16                        | 1.21                               | 1.43                                 |
| Desert                        | Borrego Springs   | 19,298,182   | 90%                       | 17,368,363              | 240  | 72,336  | 0.16                        | 10.38                              | 12.21                                |
| Fallbrook                     |                   | 80,574,549   | 90%                       | 72,517,094              | 240  | 302,020                                       | 0.25                        | 27.73                              | 32.63                                |
| Jamul-Dulzura                 |                   | 32,449,632   | 90%                       | 29,204,669              | 240  | 121,632                                       | 0.25                        | 11.17                              | 13.14                                |
| Julian                        |                   | 6,433,047  | 90%                       | 5,789,743               | 240  | 24,113  | 0.16                        | 3.46                               | 4.07                                 |
| Lakeside <sup>6</sup>         |                   | 98,162,693   | 90%                       | 88,346,424              | 240  | 367,946                                       | 0.25                        | 33.79                              | 39.75                                |
| Mountain Empire               |                   | 232,582  | 90%                       | 209,324                 | 240  | 872   | 0.16                        | 0.13                               | 0.15                                 |
| Mountain Empire               | Boulevard         | 2,606,683  | 90%                       | 2,346,015               | 240  | 9,771   | 0.16                        | 1.40                               | 1.65                                 |
| Mountain Empire               | Jacumba           | 3,496,697  | 90%                       | 3,147,027               | 240  | 13,107  | 0.16                        | 1.88                               | 2.21                                 |
| Mountain Empire               | Lake Morena/Campo | 4,489,328  | 90%                       | 4,040,396               | 240  | 16,827  | 0.16                        | 2.41                               | 2.84                                 |
| Mountain Empire               | Potrero           | 1,902,476  | 90%                       | 1,712,228               | 240  | 7,131   | 0.16                        | 1.02                               | 1.20                                 |
| Mountain Empire               | Tecate            | 413,002  | 90%                       | 371,702                 | 240  | 1,548   | 0.16                        | 0.22                               | 0.26                                 |
| North County Metro            |                   | 79,782,141   | 90%                       | 71,803,927              | 240  | 299,049                                       | 0.25                        | 27.46                              | 32.31                                |
| North County Metro            | Hidden Meadows    | 15,764,521   | 90%                       | 14,188,069              | 240  | 59,091  | 0.25                        | 5.43                               | 6.38                                 |
| North County Metro            | Twin Oaks         | 5,355,905  | 90%                       | 4,820,314               | 240  | 20,076  | 0.25                        | 1.84                               | 2.17                                 |
| North Mountain                |                   | 7,963,394  | 90%                       | 7,167,055               | 240  | 29,849  | 0.16                        | 4.28                               | 5.04                                 |
| North Mountain                | Palomar Mountain  | 895,128  | 90%                       | 805,615                 | 240  | 3,355   | 0.16                        | 0.48                               | 0.57                                 |
| Otay                          |                   | 9,330,747  | 90%                       | 8,397,672               | 240  | 34,975  | 0.16                        | 5.02                               | 5.90                                 |
| Pala-Pauma                    | Pala-Pauma        | 13,647,910   | 90%                       | 12,283,119              | 240  | 51,157  | 0.25                        | 4.70                               | 5.53                                 |
| Pendleton-De Luz              |                   | 18,792,148   | 90%                       | 16,912,933              | 240  | 70,439  | 0.25                        | 6.47                               | 7.61                                 |
| Rainbow                       |                   | 3,945,155  | 90%                       | 3,550,639               | 240  | 14,788  | 0.25                        | 1.36                               | 1.60                                 |
| Ramona                        |                   | 66,141,794   | 90%                       | 59,527,615              | 240  | 247,921                                       | 0.25                        | 22.77                              | 26.78                                |
| San Dieguito                  |                   | 84,503,793   | 90%                       | 76,053,414              | 240  | 316,748                                       | 0.25                        | 29.09                              | 34.22                                |
| Spring Valley                 |                   | 60,518,394   | 90%                       | 54,466,555              | 240  | 226,843                                       | 0.25                        | 20.83                              | 24.51                                |
| Sweetwater                    |                   | 21,940,307   | 90%                       | 19,746,276              | 240  | 82,239  | 0.25                        | 7.55                               | 8.88                                 |
| Valle De Oro                  |                   | 70,119,486   | 90%                       | 63,107,538              | 240  | 262,831                                       | 0.25                        | 24.14                              | 28.39                                |
| Valley Center                 |                   | 52,444,265   | 90%                       | 47,199,838              | 240  | 196,578                                       | 0.25                        | 18.05                              | 21.24                                |
| <b>Total</b>                  |                   | <b>\$872,230,555</b>                                     | <b>--</b>                 | <b>\$785,007,500</b>    | <b>--</b>  | <b>3,269,403</b>                              | <b>--</b>                   | <b>313.00</b>                      | <b>368.24</b>                        |

<sup>1</sup> Assumed percentage of resident expenditures that will occur within CPA if retail is made available.

<sup>2</sup> Based on ULI Dollars & Cents of Shopping Centers (2000) for the western United States, reported in 2001 dollars.

<sup>3</sup> Estimated buying power divided by average sales per square foot.

<sup>4</sup> Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup> Net acreage equal to 85% of gross acreage.

<sup>6</sup> Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-7  
Resident Supported Gross Acres of Retail Space in Regional and Super Regional Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Buying Power: Regional & Super-Regional Centers (\$2001) <sup>2</sup> | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales per Sq.Ft. (\$2001) <sup>3</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>5</sup> |
|-------------------------------|-------------------|---|---------------------------|-------------------------|--|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$76,903,434  | 0%                        | \$0                     | \$309  | -  | 0.25                        | -                                  | -                                    |
| Barona                        |                   | n/a   | 0%                        | n/a                     | 309  | -  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 38,500,458  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Central Mountain              |                   | 310,146   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Cuyamaca          | 1,113,506   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Descanso          | 3,649,525   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Pine Valley       | 4,414,859   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| County Islands                |                   | 6,315,090   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Crest/Dehesa                  |                   | 23,071,595  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Desert                        |                   | 3,200,454   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Desert                        | Borrego Springs   | 27,372,357  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Fallbrook                     |                   | 114,286,173   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Jamul-Dulzura                 |                   | 46,026,250  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Julian                        |                   | 9,124,573   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Lakeside <sup>6</sup>         |                   | 139,233,030   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Mountain Empire               |                   | 329,892   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Boulevard         | 3,697,294   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Jacumba           | 4,959,682   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Lake Morena/Campo | 6,367,621   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Potrero           | 2,698,454   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Tecate            | 585,799   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| North County Metro            |                   | 113,162,229   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| North County Metro            | Hidden Meadows    | 22,360,246  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| North County Metro            | Twin Oaks         | 7,596,764   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| North Mountain                | North Mountain    | 11,295,203  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| North Mountain                | Palomar Mountain  | 1,269,641   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Otay                          |                   | 13,234,642  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Pala-Pauma                    | Pala-Pauma        | 19,358,065  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Pendleton-De Luz              |                   | 26,654,604  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Rainbow                       |                   | 5,595,770   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Ramona                        |                   | 93,814,892  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| San Dieguito                  |                   | 119,859,376   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Spring Valley                 |                   | 85,838,715  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Sweetwater                    |                   | 31,119,923  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Valle De Oro                  |                   | 99,456,813  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Valley Center                 |                   | 74,386,446  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| <b>Total</b>                  |                   | <b>\$1,237,163,522</b>  | <b>--</b>                 | <b>\$0</b>              | <b>--</b>                                      | <b>-</b>                                   | <b>--</b>                   | <b>-</b>                           | <b>-</b>                             |

<sup>1</sup>Assumed percentage of resident expenditures that will occur within CPA.

<sup>2</sup>Based on ERA knowledge of local retail market, reported in 2001 dollars.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-8  
Supportable Square Feet of Retail Space Outside of Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Buying Power, Non-Center (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales per Sq. Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption | Estimated Net Acreage <sup>4</sup> | Estimated Gross Acreage <sup>5</sup> |
|-------------------------------|-------------------|---|---------------------------|-------------------------|---|--|----------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$121,358,188                               | 90%                       | \$109,222,369           | \$245   | 444,958                                    | 0.25           | 40.86                              | 48.07                                |
| Barona                        |                   | n/a   | 90%                       | n/a                     | 245   | n/a  | 0.25           | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 60,756,009                                  | 90%                       | 54,680,408              | 245   | 222,761                                    | 0.25           | 20.46                              | 24.07                                |
| Central Mountain              |                   | 489,429                                     | 90%                       | 440,486                 | 245   | 1,794                                      | 0.16           | 0.26                               | 0.30                                 |
| Central Mountain              | Cuyamaca          | 1,757,179                                   | 90%                       | 1,581,461               | 245   | 6,443                                      | 0.16           | 0.92                               | 1.09                                 |
| Central Mountain              | Descanso          | 5,759,168                                   | 90%                       | 5,183,251               | 245   | 21,116                                     | 0.16           | 3.03                               | 3.56                                 |
| Central Mountain              | Pine Valley       | 6,966,909                                   | 90%                       | 6,270,218               | 245   | 25,544                                     | 0.16           | 3.67                               | 4.31                                 |
| County Islands                |                   | 9,965,587                                   | 90%                       | 8,969,028               | 245   | 36,539                                     | 0.25           | 3.36                               | 3.95                                 |
| Crest/Dehesa                  |                   | 36,408,348                                  | 90%                       | 32,767,513              | 245   | 133,491                                    | 0.25           | 12.26                              | 14.42                                |
| Desert                        |                   | 5,050,507                                   | 90%                       | 4,545,456               | 245   | 18,518                                     | 0.16           | 2.66                               | 3.13                                 |
| Desert                        | Borrego Springs   | 43,195,206                                  | 90%                       | 38,875,685              | 245   | 158,375                                    | 0.16           | 22.72                              | 26.73                                |
| Fallbrook                     |                   | 180,350,371                                 | 90%                       | 162,315,334             | 245   | 661,252                                    | 0.25           | 60.72                              | 71.44                                |
| Jamul-Dulzura                 |                   | 72,632,156                                  | 90%                       | 65,368,941              | 245   | 266,305                                    | 0.25           | 24.45                              | 28.77                                |
| Julian                        |                   | 14,399,119                                  | 90%                       | 12,959,207              | 245   | 52,794                                     | 0.16           | 7.57                               | 8.91                                 |
| Lakeside <sup>6</sup>         |                   | 219,717,992                                 | 90%                       | 197,746,193             | 245   | 805,593                                    | 0.25           | 73.98                              | 87.03                                |
| Mountain Empire               |                   | 520,589                                     | 90%                       | 468,530                 | 245   | 1,909                                      | 0.16           | 0.27                               | 0.32                                 |
| Mountain Empire               | Boulevard         | 5,834,550                                   | 90%                       | 5,251,095               | 245   | 21,392                                     | 0.16           | 3.07                               | 3.61                                 |
| Mountain Empire               | Jacumba           | 7,826,672                                   | 90%                       | 7,044,005               | 245   | 28,696                                     | 0.16           | 4.12                               | 4.84                                 |
| Mountain Empire               | Lake Moreno/Campo | 10,048,484                                  | 90%                       | 9,043,635               | 245   | 36,843                                     | 0.16           | 5.29                               | 6.22                                 |
| Mountain Empire               | Potrero           | 4,258,320                                   | 90%                       | 3,832,488               | 245   | 15,613                                     | 0.16           | 2.24                               | 2.64                                 |
| Mountain Empire               | Tecate            | 924,425                                     | 90%                       | 831,983                 | 245   | 3,389                                      | 0.16           | 0.49                               | 0.57                                 |
| North County Metro            |                   | 178,576,720                                 | 90%                       | 160,719,048             | 245   | 654,749                                    | 0.25           | 60.12                              | 70.73                                |
| North County Metro            | Hidden Meadows    | 35,285,797                                  | 90%                       | 31,757,218              | 245   | 129,375                                    | 0.25           | 11.88                              | 13.98                                |
| North County Metro            | Twin Oaks         | 11,988,145                                  | 90%                       | 10,789,331              | 245   | 43,954                                     | 0.25           | 4.04                               | 4.75                                 |
| North Mountain                | North Mountain    | 17,824,501                                  | 90%                       | 16,042,051              | 245   | 65,353                                     | 0.16           | 9.38                               | 11.03                                |
| North Mountain                | Palomar Mountain  | 2,003,569                                   | 90%                       | 1,803,213               | 245   | 7,346                                      | 0.16           | 1.05                               | 1.24                                 |
| Otay                          |                   | 20,885,052                                  | 90%                       | 18,796,547              | 245   | 76,575                                     | 0.16           | 10.99                              | 12.93                                |
| Pala-Pauma                    | Pala-Pauma        | 30,548,177                                  | 90%                       | 27,493,359              | 245   | 112,004                                    | 0.25           | 10.29                              | 12.10                                |
| Pendleton-De Luz              |                   | 42,062,548                                  | 90%                       | 37,856,293              | 245   | 154,222                                    | 0.25           | 14.16                              | 16.66                                |
| Rainbow                       |                   | 8,830,458                                   | 90%                       | 7,947,412               | 245   | 32,377                                     | 0.25           | 2.97                               | 3.50                                 |
| Ramona                        |                   | 148,045,472                                 | 90%                       | 133,240,925             | 245   | 542,806                                    | 0.25           | 49.84                              | 58.64                                |
| San Dieguito                  |                   | 189,145,215                                 | 90%                       | 170,230,694             | 245   | 693,498                                    | 0.25           | 63.68                              | 74.92                                |
| Spring Valley                 |                   | 135,458,591                                 | 90%                       | 121,912,732             | 245   | 496,657                                    | 0.25           | 45.61                              | 53.65                                |
| Sweetwater                    |                   | 49,109,087                                  | 90%                       | 44,198,178              | 245   | 180,058                                    | 0.25           | 16.53                              | 19.45                                |
| Valle De Oro                  |                   | 156,948,758                                 | 90%                       | 141,253,883             | 245   | 575,540                                    | 0.25           | 52.84                              | 62.17                                |
| Valley Center                 |                   | 117,386,231                                 | 90%                       | 105,647,608             | 245   | 430,395                                    | 0.25           | 39.52                              | 46.50                                |
| <b>Total</b>                  |                   | <b>\$1,952,317,530</b>                      | <b>--</b>                 | <b>\$1,757,085,777</b>  | <b>--</b>                                       | <b>7,158,142</b>                           | <b>--</b>      | <b>685.29</b>                      | <b>806.23</b>                        |

<sup>1</sup>Assumed percentage of resident expenditures that will occur within CPA if retail is made available.

<sup>2</sup>80% of average sales per sq.ft. for neighborhood centers reported by ULI Dollars & Cents of Shopping Centers 2000 for the western United States, reported in 2001 dollars.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-9**  
**Total Resident Supported Retail Acres for Neighborhood, Community & Non-Center Outlets**

| <b>Community Planning Area (CPA)</b> | <b>Subarea Group</b> | <b>Estimated Net Acreage<sup>1</sup></b> | <b>Estimated Gross Acreage<sup>2</sup></b> |
|--------------------------------------|----------------------|--|--|
| Alpine                               |                      | 72.52                                    | 85.32                                      |
| Barona                               |                      | n/a                                      | n/a  |
| Bonsall                              | Bonsall              | 36.31                                    | 42.71                                      |
| Central Mountain                     |                      | 0.46                                     | 0.54                                       |
| Central Mountain                     | Cuyamaca             | 1.64                                     | 1.93                                       |
| Central Mountain                     | Descanso             | 5.38                                     | 6.33                                       |
| Central Mountain                     | Pine Valley          | 6.51                                     | 7.65                                       |
| County Islands                       |                      | 5.96                                     | 7.01                                       |
| Crest/Dehesa                         |                      | 21.76                                    | 25.60                                      |
| Desert                               |                      | 4.72                                     | 5.55                                       |
| Desert                               | Borrego Springs      | 40.33                                    | 47.45                                      |
| Fallbrook                            |                      | 107.78                                   | 126.79                                     |
| Jamul-Dulzura                        |                      | 43.40                                    | 51.06                                      |
| Julian                               |                      | 13.44                                    | 15.82                                      |
| Lakeside <sup>3</sup>                |                      | 131.30                                   | 154.47                                     |
| Mountain Empire                      |                      | 0.49                                     | 0.57                                       |
| Mountain Empire                      | Boulevard            | 5.45                                     | 6.41                                       |
| Mountain Empire                      | Jacumba              | 7.31                                     | 8.60                                       |
| Mountain Empire                      | Lake Morena/Campo    | 9.38                                     | 11.04                                      |
| Mountain Empire                      | Potrero              | 3.98                                     | 4.68                                       |
| Mountain Empire                      | Tecate               | 0.86                                     | 1.02                                       |
| North County Metro                   |                      | 106.72                                   | 125.55                                     |
| North County Metro                   | Hidden Meadows       | 21.09                                    | 24.81                                      |
| North County Metro                   | Twin Oaks            | 7.16                                     | 8.43                                       |
| North Mountain                       | North Mountain       | 16.64                                    | 19.58                                      |
| North Mountain                       | Palomar Mountain     | 1.87                                     | 2.20                                       |
| Otay                                 |                      | 19.50                                    | 22.94                                      |
| Pala-Pauma                           | Pala-Pauma           | 18.26                                    | 21.48                                      |
| Pendleton-De Luz                     |                      | 25.14                                    | 29.57                                      |
| Rainbow                              |                      | 5.28                                     | 6.21                                       |
| Ramona                               |                      | 88.47                                    | 104.08                                     |
| San Dieguito                         |                      | 113.03                                   | 132.98                                     |
| Spring Valley                        |                      | 80.95                                    | 95.23                                      |
| Sweetwater                           |                      | 29.35                                    | 34.53                                      |
| Valle De Oro                         |                      | 93.79                                    | 110.34                                     |
| Valley Center                        |                      | 70.15                                    | 82.53                                      |
| <b>Total</b>                         |                      | <b>1,216.34</b>                          | <b>1,430.99</b>                            |

<sup>1</sup>Based on an estimated Floor Area Ratio (FAR) of 0.25

<sup>2</sup>Net acreage equal to 85% of gross acreage.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-10**

**Comparison: Retail Land Developed As of 2002 & Estimated Resident Supported Retail Acres at Build-out**

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Currently Developed Retail Acres with Estimated Resident Supported Acres at Build-out <sup>1</sup> |                   |
|-------------------------------|-------------------|---|--|-------------------|
|                               |                   |   | Currently Developed Retail Acres   | Surplus/(Deficit) |
| Alpine                        |                   | 85.32   | 83.04  | (2.28)            |
| Barona                        |                   | n/a   | n/a  | n/a               |
| Bonsall                       | Bonsall           | 42.71   | 28.31  | (14.40)           |
| Central Mountain              |                   | 0.54  | 0.00   | (0.54)            |
| Central Mountain              | Cuyamaca          | 1.93  | 1.48   | (0.45)            |
| Central Mountain              | Descanso          | 6.33  | 4.85   | (1.48)            |
| Central Mountain              | Pine Valley       | 7.65  | 16.81  | 9.16              |
| County Islands                |                   | 7.01  | 1.16   | (5.85)            |
| Crest/Dehesa                  |                   | 25.60   | 5.61   | (19.99)           |
| Desert                        |                   | 5.55  | 0.00   | (5.55)            |
| Desert                        | Borrego Springs   | 47.45   | 64.37  | 16.92             |
| Fallbrook                     |                   | 126.79  | 110.58   | (16.21)           |
| Jamul-Dulzura                 |                   | 51.06   | 22.14  | (28.92)           |
| Julian                        |                   | 15.82   | 30.67  | 14.85             |
| Lakeside <sup>3</sup>         |                   | 154.47  | 212.43   | 57.96             |
| Mountain Empire               |                   | 0.57  | 0.00   | (0.57)            |
| Mountain Empire               | Boulevard         | 6.41  | 30.41  | 24.00             |
| Mountain Empire               | Jacumba           | 8.60  | 12.67  | 4.07              |
| Mountain Empire               | Lake Morena/Campo | 11.04   | 16.44  | 5.40              |
| Mountain Empire               | Potrero           | 4.68  | 1.27   | (3.41)            |
| Mountain Empire               | Tecate            | 1.02  | 3.65   | 2.63              |
| North County Metro            |                   | 125.55  | 21.94  | (103.61)          |
| North County Metro            | Hidden Meadows    | 24.81   | 1.28   | (23.53)           |
| North County Metro            | Twin Oaks         | 8.43  | 1.06   | (7.37)            |
| North Mountain                | North Mountain    | 19.58   | 21.64  | 2.06              |
| North Mountain                | Palomar Mountain  | 2.20  | 3.45   | 1.25              |
| Otay                          |                   | 22.94   | 0.00   | (22.94)           |
| Pala-Pauma                    | Pala-Pauma        | 21.48   | 5.67   | (15.81)           |
| Pendleton-De Luz              |                   | 29.57   | 69.68  | 40.11             |
| Rainbow                       |                   | 6.21  | 6.82   | 0.61              |
| Ramona                        |                   | 104.08  | 129.69   | 25.61             |
| San Dieguito                  |                   | 132.98  | 28.33  | (104.65)          |
| Spring Valley                 |                   | 95.23   | 129.67   | 34.44             |
| Sweetwater                    |                   | 34.53   | 10.19  | (24.34)           |
| Valle De Oro                  |                   | 110.34  | 169.88   | 59.54             |
| Valley Center                 |                   | 82.53   | 27.41  | (55.12)           |
| <b>Total</b>                  |                   | <b>1,430.99</b>   | <b>1,272.60</b>  | <b>(158.39)</b>   |

<sup>1</sup>Includes only neighborhood, community, and non-center retail acres; provided by Technology Associates International Corporation.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

**Table B-11**

**Comparison: Retail Land Planned Under Existing General Plan & Estimated Resident Supported Retail Acres at Build-out**

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Current General Plan with Estimated Resident Supported Acres at Build-out <sup>1</sup> |                   |
|-------------------------------|-------------------|---|--|-------------------|
|                               |                   |   | Estimated Gross Acreage Allowed under Current GP   | Surplus/(Deficit) |
| Alpine                        |                   | 85.32   | 110.18   | 24.86             |
| Barona                        |                   | n/a   | n/a  | n/a               |
| Bonsall                       | Bonsall           | 42.71   | 125.72   | 83.01             |
| Central Mountain              |                   | 0.54  | 0.00   | (0.54)            |
| Central Mountain              | Cuyamaca          | 1.93  | 0.00   | (1.93)            |
| Central Mountain              | Descanso          | 6.33  | 5.46   | (0.87)            |
| Central Mountain              | Pine Valley       | 7.65  | 17.10  | 9.45              |
| County Islands                |                   | 7.01  | 1.10   | (5.91)            |
| Crest/Dehesa                  |                   | 25.60   | 13.68  | (11.92)           |
| Desert                        |                   | 5.55  | 0.00   | (5.55)            |
| Desert                        | Borrego Springs   | 47.45   | 333.51   | 286.06            |
| Fallbrook                     |                   | 126.79  | 236.51   | 109.72            |
| Jamul-Dulzura                 |                   | 51.06   | 87.38  | 36.32             |
| Julian                        |                   | 15.82   | 75.03  | 59.21             |
| Lakeside <sup>3</sup>         |                   | 154.47  | 380.77   | 226.30            |
| Mountain Empire               |                   | 0.57  | 28.50  | 27.93             |
| Mountain Empire               | Boulevard         | 6.41  | 121.18   | 114.77            |
| Mountain Empire               | Jacumba           | 8.60  | 18.20  | 9.60              |
| Mountain Empire               | Lake Morena/Campo | 11.04   | 48.20  | 37.16             |
| Mountain Empire               | Potrero           | 4.68  | 14.94  | 10.26             |
| Mountain Empire               | Tecate            | 1.02  | 40.23  | 39.21             |
| North County Metro            |                   | 125.55  | 36.90  | (88.65)           |
| North County Metro            | Hidden Meadows    | 24.81   | 39.30  | 14.49             |
| North County Metro            | Twin Oaks         | 8.43  | 22.60  | 14.17             |
| North Mountain                | North Mountain    | 19.58   | 13.01  | (6.57)            |
| North Mountain                | Palomar Mountain  | 2.20  | 0.00   | (2.20)            |
| Otay                          |                   | 22.94   | 111.20   | 88.26             |
| Pala-Pauma                    | Pala-Pauma        | 21.48   | 37.08  | 15.60             |
| Pendleton-De Luz              |                   | 29.57   | 0.00   | (29.57)           |
| Rainbow                       |                   | 6.21  | 31.95  | 25.74             |
| Ramona                        |                   | 104.08  | 274.25   | 170.17            |
| San Dieguito                  |                   | 132.98  | 45.05  | (87.93)           |
| Spring Valley                 |                   | 95.23   | 205.37   | 110.14            |
| Sweetwater                    |                   | 34.53   | 29.92  | (4.61)            |
| Valle De Oro                  |                   | 110.34  | 219.73   | 109.39            |
| Valley Center                 |                   | 82.53   | 100.21   | 17.68             |
| <b>Total</b>                  |                   | <b>1,431.0</b>  | <b>2,824.26</b>  | <b>1,393.27</b>   |

<sup>1</sup>Includes only neighborhood, community, and non-center retail acres; provided by Technology Associates International Corporation.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

Table B-12

Comparison: Retail Land Planned Under Proposed General Plan & Estimated Resident Supported Retail Acres at Build-out

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Proposed General Plan with Estimated Resident Supported Acres at Build-out <sup>1</sup> |                   |
|-------------------------------|-------------------|---|---|-------------------|
|                               |                   |   | Estimated Gross Acreage Allowed under Proposed GP   | Surplus/(Deficit) |
| Alpine                        |                   | 85.32   | 134.46  | 49.14             |
| Barona                        |                   | n/a   | 0.00  | n/a               |
| Bonsall                       | Bonsall           | 42.71   | 127.77  | 85.06             |
| Central Mountain              |                   | 0.54  | 0.00  | (0.54)            |
| Central Mountain              | Cuyamaca          | 1.93  | 1.98  | 0.05              |
| Central Mountain              | Descanso          | 6.33  | 6.63  | 0.30              |
| Central Mountain              | Pine Valley       | 7.65  | 19.09   | 11.44             |
| County Islands                |                   | 7.01  | 0.00  | (7.01)            |
| Crest/Dehesa                  |                   | 25.60   | 17.01   | (8.59)            |
| Desert                        |                   | 5.55  | 18.79   | 13.24             |
| Desert                        | Borrego Springs   | 47.45   | 281.51  | 234.06            |
| Fallbrook                     |                   | 126.79  | 240.18  | 113.39            |
| Jamul-Dulzura                 |                   | 51.06   | 88.28   | 37.22             |
| Julian                        |                   | 15.82   | 71.65   | 55.83             |
| Lakeside <sup>3</sup>         |                   | 154.47  | 380.77  | 226.30            |
| Mountain Empire               |                   | 0.57  | 28.50   | 27.93             |
| Mountain Empire               | Boulevard         | 6.41  | 122.17  | 115.76            |
| Mountain Empire               | Jacumba           | 8.60  | 24.50   | 15.90             |
| Mountain Empire               | Lake Morena/Campo | 11.04   | 51.39   | 40.35             |
| Mountain Empire               | Potrero           | 4.68  | 24.30   | 19.62             |
| Mountain Empire               | Tecate            | 1.02  | 54.72   | 53.70             |
| North County Metro            |                   | 125.55  | 53.55   | (72.00)           |
| North County Metro            | Hidden Meadows    | 24.81   | 2.07  | (22.74)           |
| North County Metro            | Twin Oaks         | 8.43  | 39.45   | 31.02             |
| North Mountain                | North Mountain    | 19.58   | 38.07   | 18.49             |
| North Mountain                | Palomar Mountain  | 2.20  | 1.53  | (0.67)            |
| Otay                          |                   | 22.94   | 111.20  | 88.26             |
| Pala-Pauma                    | Pala-Pauma        | 21.48   | 36.36   | 14.88             |
| Pendleton-De Luz              |                   | 29.57   | 0.00  | (29.57)           |
| Rainbow                       |                   | 6.21  | 41.22   | 35.01             |
| Ramona                        |                   | 104.08  | 336.63  | 232.55            |
| San Dieguito                  |                   | 132.98  | 44.65   | (88.33)           |
| Spring Valley                 |                   | 95.23   | 200.78  | 105.55            |
| Sweetwater                    |                   | 34.53   | 29.92   | (4.61)            |
| Valle De Oro                  |                   | 110.34  | 218.66  | 108.32            |
| Valley Center                 |                   | 82.53   | 215.53  | 133.00            |
| <b>Total</b>                  |                   | <b>1,430.99</b>   | <b>3,063.32</b>   | <b>1,632.33</b>   |

<sup>1</sup>Includes Neighborhood Commercial, Service Commercial, and Rural Commercial designated lands, two-thirds of General Commercial lands, for the July 2004 Baseline General Plan Scenario, plus an assumed share of Specific Plan Areas per County staff estimates in 2002.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

**Table B-13**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Supportable Gross Acres of Retail Space in Neighborhood Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Resident Buying Power- Neighborhood Centers (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Assumed Sales per Sq.Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>5</sup> |
|-------------------------------|-------------------|--|---------------------------|-------------------------|--|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$38,614,038   | 90%                       | \$34,752,634            | \$200  | 173,763                                    | 0.25                        | 15.96                              | 18.77                                |
| Barona                        |                   | n/a  | 90%                       | n/a                     | 200  | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 19,331,492   | 90%                       | 17,398,343              | 200  | 86,992                                     | 0.25                        | 7.99                               | 9.40                                 |
| Central Mountain              |                   | 155,728  | 90%                       | 140,155                 | 200  | 701  | 0.16                        | 0.10                               | 0.12                                 |
| Central Mountain              | Cuyamaca          | 559,103  | 90%                       | 503,193                 | 200  | 2,516                                      | 0.16                        | 0.36                               | 0.42                                 |
| Central Mountain              | Descanso          | 1,832,466  | 90%                       | 1,649,219               | 200  | 8,246                                      | 0.16                        | 1.18                               | 1.39                                 |
| Central Mountain              | Pine Valley       | 2,216,748  | 90%                       | 1,995,073               | 200  | 9,975                                      | 0.16                        | 1.43                               | 1.68                                 |
| County Islands                |                   | 3,170,874  | 90%                       | 2,853,787               | 200  | 14,269                                     | 0.25                        | 1.31                               | 1.54                                 |
| Crest/Dehesa                  |                   | 11,584,495   | 90%                       | 10,426,045              | 200  | 52,130                                     | 0.25                        | 4.79                               | 5.63                                 |
| Desert                        |                   | 1,606,982  | 90%                       | 1,446,284               | 200  | 7,231                                      | 0.16                        | 1.04                               | 1.22                                 |
| Desert                        | Borrego Springs   | 13,743,954   | 90%                       | 12,369,558              | 200  | 61,848                                     | 0.16                        | 8.87                               | 10.44                                |
| Fallbrook                     |                   | 57,384,312   | 90%                       | 51,645,881              | 200  | 258,229                                    | 0.25                        | 23.71                              | 27.90                                |
| Jamul-Dulzura                 |                   | 23,110,273   | 90%                       | 20,799,246              | 200  | 103,996                                    | 0.25                        | 9.55                               | 11.23                                |
| Julian                        |                   | 4,581,546  | 90%                       | 4,123,391               | 200  | 20,617                                     | 0.16                        | 2.96                               | 3.48                                 |
| Lakeside <sup>6</sup>         |                   | 69,910,396   | 90%                       | 62,919,356              | 200  | 314,597                                    | 0.25                        | 28.89                              | 33.99                                |
| Mountain Empire               |                   | 165,642  | 90%                       | 149,078                 | 200  | 745  | 0.16                        | 0.11                               | 0.13                                 |
| Mountain Empire               | Boulevard         | 1,856,451  | 90%                       | 1,670,806               | 200  | 8,354                                      | 0.16                        | 1.20                               | 1.41                                 |
| Mountain Empire               | Jacumba           | 2,490,309  | 90%                       | 2,241,278               | 200  | 11,206                                     | 0.16                        | 1.61                               | 1.89                                 |
| Mountain Empire               | Lake Morena/Campo | 3,197,251  | 90%                       | 2,877,526               | 200  | 14,388                                     | 0.16                        | 2.06                               | 2.43                                 |
| Mountain Empire               | Potrero           | 1,354,922  | 90%                       | 1,219,430               | 200  | 6,097                                      | 0.16                        | 0.87                               | 1.03                                 |
| Mountain Empire               | Tecate            | 294,136  | 90%                       | 264,722                 | 200  | 1,324                                      | 0.16                        | 0.19                               | 0.22                                 |
| North County Metro            |                   | 56,819,967   | 90%                       | 51,137,971              | 200  | 255,690                                    | 0.25                        | 23.48                              | 27.62                                |
| North County Metro            | Hidden Meadows    | 11,227,319   | 90%                       | 10,104,587              | 200  | 50,523                                     | 0.25                        | 4.64                               | 5.46                                 |
| North County Metro            | Twin Oaks         | 3,814,417  | 90%                       | 3,432,975               | 200  | 17,165                                     | 0.25                        | 1.58                               | 1.85                                 |
| North Mountain                | North Mountain    | 5,671,442  | 90%                       | 5,104,298               | 200  | 25,521                                     | 0.16                        | 3.66                               | 4.31                                 |
| North Mountain                | Palomar Mountain  | 637,501  | 90%                       | 573,750                 | 200  | 2,869                                      | 0.16                        | 0.41                               | 0.48                                 |
| Otay                          |                   | 6,645,256  | 90%                       | 5,980,730               | 200  | 29,904                                     | 0.16                        | 4.29                               | 5.05                                 |
| Pala-Pauma                    | Pala-Pauma        | 9,719,892  | 90%                       | 8,747,903               | 200  | 43,740                                     | 0.25                        | 4.02                               | 4.73                                 |
| Pendleton-De Luz              |                   | 13,383,562   | 90%                       | 12,045,206              | 200  | 60,226                                     | 0.25                        | 5.53                               | 6.51                                 |
| Rainbow                       |                   | 2,809,696  | 90%                       | 2,528,727               | 200  | 12,644                                     | 0.25                        | 1.16                               | 1.37                                 |
| Ramona                        |                   | 47,105,462   | 90%                       | 42,394,916              | 200  | 211,975                                    | 0.25                        | 19.47                              | 22.90                                |
| San Dieguito                  |                   | 60,182,676   | 90%                       | 54,164,409              | 200  | 270,822                                    | 0.25                        | 24.87                              | 29.26                                |
| Spring Valley                 |                   | 43,100,538   | 90%                       | 38,790,484              | 200  | 193,952                                    | 0.25                        | 17.81                              | 20.95                                |
| Sweetwater                    |                   | 15,625,647   | 90%                       | 14,063,082              | 200  | 70,315                                     | 0.25                        | 6.46                               | 7.60                                 |
| Valle De Oro                  |                   | 49,938,331   | 90%                       | 44,944,498              | 200  | 224,722                                    | 0.25                        | 20.64                              | 24.28                                |
| Valley Center                 |                   | 37,350,231   | 90%                       | 33,615,208              | 200  | 168,076                                    | 0.25                        | 15.43                              | 18.16                                |
| <b>Total</b>                  |                   | <b>\$621,193,055</b>   | <b>--</b>                 | <b>\$559,073,750</b>    | <b>--</b>                                      | <b>2,795,369</b>                           | <b>--</b>                   | <b>267.62</b>                      | <b>314.84</b>                        |

<sup>1</sup>Estimated percentage of resident expenditures that will occur within CPA.

<sup>2</sup>Assumes an average rent of \$1.33/sq.ft per month.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-14**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Supportable Gross Acres of Retail Space in Community Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Resident Buying Power: Community Centers (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Assumed Sales per Sq.Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>5</sup> |
|-------------------------------|-------------------|---|---------------------------|-------------------------|--|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$54,218,803  | 90%                       | \$48,796,923            | \$200  | 243,985                                    | 0.25                        | 22.40                              | 26.36                                |
| Barona                        |                   | n/a   | 90%                       | n/a                     | 200  | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 27,143,765  | 90%                       | 24,429,388              | 200  | 122,147                                    | 0.25                        | 11.22                              | 13.20                                |
| Central Mountain              |                   | 218,661   | 90%                       | 196,795                 | 200  | 984  | 0.16                        | 0.14                               | 0.17                                 |
| Central Mountain              | Cuyamaca          | 785,049   | 90%                       | 706,544                 | 200  | 3,533                                      | 0.16                        | 0.51                               | 0.60                                 |
| Central Mountain              | Descanso          | 2,573,005   | 90%                       | 2,315,704               | 200  | 11,579                                     | 0.16                        | 1.66                               | 1.95                                 |
| Central Mountain              | Pine Valley       | 3,112,583   | 90%                       | 2,801,325               | 200  | 14,007                                     | 0.16                        | 2.01                               | 2.36                                 |
| County Islands                |                   | 4,452,293   | 90%                       | 4,007,064               | 200  | 20,035                                     | 0.25                        | 1.84                               | 2.16                                 |
| Crest/Dehesa                  |                   | 16,266,039  | 90%                       | 14,639,435              | 200  | 73,197                                     | 0.25                        | 6.72                               | 7.91                                 |
| Desert                        |                   | 2,256,398   | 90%                       | 2,030,759               | 200  | 10,154                                     | 0.16                        | 1.46                               | 1.71                                 |
| Desert                        | Borrego Springs   | 19,298,182  | 90%                       | 17,368,363              | 200  | 86,842                                     | 0.16                        | 12.46                              | 14.66                                |
| Fallbrook                     |                   | 80,574,549  | 90%                       | 72,517,094              | 200  | 362,585                                    | 0.25                        | 33.30                              | 39.17                                |
| Jamul-Dulzura                 |                   | 32,449,632  | 90%                       | 29,204,669              | 200  | 146,023                                    | 0.25                        | 13.41                              | 15.78                                |
| Julian                        |                   | 6,433,047   | 90%                       | 5,789,743               | 200  | 28,949                                     | 0.16                        | 4.15                               | 4.89                                 |
| Lakeside <sup>6</sup>         |                   | 98,162,693  | 90%                       | 88,346,424              | 200  | 441,732                                    | 0.25                        | 40.56                              | 47.72                                |
| Mountain Empire               |                   | 232,582   | 90%                       | 209,324                 | 200  | 1,047                                      | 0.16                        | 0.15                               | 0.18                                 |
| Mountain Empire               | Boulevard         | 2,606,683   | 90%                       | 2,346,015               | 200  | 11,730                                     | 0.16                        | 1.68                               | 1.98                                 |
| Mountain Empire               | Jacumba           | 3,496,697   | 90%                       | 3,147,027               | 200  | 15,735                                     | 0.16                        | 2.26                               | 2.66                                 |
| Mountain Empire               | Lake Morena/Campo | 4,489,328   | 90%                       | 4,040,396               | 200  | 20,202                                     | 0.16                        | 2.90                               | 3.41                                 |
| Mountain Empire               | Potrero           | 1,902,476   | 90%                       | 1,712,228               | 200  | 8,561                                      | 0.16                        | 1.23                               | 1.45                                 |
| Mountain Empire               | Tecate            | 413,002   | 90%                       | 371,702                 | 200  | 1,859                                      | 0.16                        | 0.27                               | 0.31                                 |
| North County Metro            |                   | 79,782,141  | 90%                       | 71,803,927              | 200  | 359,020                                    | 0.25                        | 32.97                              | 38.79                                |
| North County Metro            | Hidden Meadows    | 15,764,521  | 90%                       | 14,188,069              | 200  | 70,940                                     | 0.25                        | 6.51                               | 7.66                                 |
| North County Metro            | Twin Oaks         | 5,355,905   | 90%                       | 4,820,314               | 200  | 24,102                                     | 0.25                        | 2.21                               | 2.60                                 |
| North Mountain                | North Mountain    | 7,963,394   | 90%                       | 7,167,055               | 200  | 35,835                                     | 0.16                        | 5.14                               | 6.05                                 |
| North Mountain                | Palomar Mountain  | 895,128   | 90%                       | 805,615                 | 200  | 4,028                                      | 0.16                        | 0.58                               | 0.68                                 |
| Otay                          |                   | 9,330,747   | 90%                       | 8,397,672               | 200  | 41,988                                     | 0.16                        | 6.02                               | 7.09                                 |
| Pala-Pauma                    | Pala-Pauma        | 13,647,910  | 90%                       | 12,283,119              | 200  | 61,416                                     | 0.25                        | 5.64                               | 6.63                                 |
| Pendleton-De Luz              |                   | 18,792,148  | 90%                       | 16,912,933              | 200  | 84,565                                     | 0.25                        | 7.77                               | 9.14                                 |
| Rainbow                       |                   | 3,945,155   | 90%                       | 3,550,639               | 200  | 17,753                                     | 0.25                        | 1.63                               | 1.92                                 |
| Ramona                        |                   | 66,141,794  | 90%                       | 59,527,615              | 200  | 297,638                                    | 0.25                        | 27.33                              | 32.15                                |
| San Dieguito                  |                   | 84,503,793  | 90%                       | 76,053,414              | 200  | 380,267                                    | 0.25                        | 34.92                              | 41.08                                |
| Spring Valley                 |                   | 60,518,394  | 90%                       | 54,466,555              | 200  | 272,333                                    | 0.25                        | 25.01                              | 29.42                                |
| Sweetwater                    |                   | 21,940,307  | 90%                       | 19,746,276              | 200  | 98,731                                     | 0.25                        | 9.07                               | 10.67                                |
| Valle De Oro                  |                   | 70,119,486  | 90%                       | 63,107,538              | 200  | 315,538                                    | 0.25                        | 28.97                              | 34.09                                |
| Valley Center                 |                   | 52,444,265  | 90%                       | 47,199,838              | 200  | 235,999                                    | 0.25                        | 21.67                              | 25.50                                |
| <b>Total</b>                  |                   | <b>\$872,230,555</b>  | --                        | <b>\$785,007,500</b>    | --   | <b>3,925,037</b>                           | --                          | <b>375.77</b>                      | <b>442.08</b>                        |

<sup>1</sup>Estimated percentage of resident expenditures that will occur within CPA.

<sup>2</sup>Assumes an average rent of \$1.33/sq.ft per month.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-15**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Supportable Gross Acres of Retail Space in Regional and Super Regional Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Resident Buying Power: Regional & Super-Regional Centers (\$2001) <sup>1</sup> | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Average Sales per Sq.Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>6</sup> |
|-------------------------------|-------------------|--|---------------------------|-------------------------|--|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$76,903,434   | 0%                        | \$0                     | \$309  | -  | 0.25                        | -                                  | -                                    |
| Barona                        |                   | n/a  | 0%                        | n/a                     | 309  | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | \$38,500,458   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Central Mountain              |                   | \$310,146  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Cuyamaca          | \$1,113,506  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Descanso          | \$3,649,525  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Central Mountain              | Pine Valley       | \$4,414,859  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| County Islands                |                   | \$6,315,090  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Crest/Dehesa                  |                   | \$23,071,595   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Desert                        |                   | \$3,200,454  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Desert                        | Borrego Springs   | \$27,372,357   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Fallbrook                     |                   | \$114,286,173  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Jamul-Dulzura                 |                   | \$46,026,250   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Julian                        |                   | \$9,124,573  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Lakeside <sup>6</sup>         |                   | \$139,233,030  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Mountain Empire               |                   | \$329,892  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Boulevard         | \$3,697,294  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Jacumba           | \$4,959,682  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Lake Morena/Campo | \$6,367,621  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Potrero           | \$2,698,454  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Mountain Empire               | Tecate            | \$585,799  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| North County Metro            |                   | \$113,162,229  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| North County Metro            | Hidden Meadows    | \$22,360,246   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| North County Metro            | Twin Oaks         | \$7,596,764  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| North Mountain                |                   | \$11,295,203   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| North Mountain                | Palomar Mountain  | \$1,269,641  | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Otay                          |                   | \$13,234,642   | 0%                        | 0                       | 309  | -  | 0.16                        | -                                  | -                                    |
| Pala-Pauma                    | Pala-Pauma        | \$19,358,065   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Pendleton-De Luz              |                   | \$26,654,604   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Rainbow                       |                   | \$5,595,770  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Ramona                        |                   | \$93,814,892   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| San Dieguito                  |                   | \$119,859,376  | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Spring Valley                 |                   | \$85,838,715   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Sweetwater                    |                   | \$31,119,923   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Valle De Oro                  |                   | \$99,456,813   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| Valley Center                 |                   | \$74,386,446   | 0%                        | 0                       | 309  | -  | 0.25                        | -                                  | -                                    |
| <b>Total</b>                  |                   | <b>\$1,237,163,522</b>   | <b>--</b>                 | <b>\$0</b>              | <b>--</b>                                      | <b>-</b>                                   | <b>--</b>                   | <b>-</b>                           | <b>-</b>                             |

<sup>1</sup>Estimated percentage of resident expenditures likely to occur within CPA.

<sup>2</sup>Based on ERA knowledge of local retail market, reported in 2001 dollars.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-16**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Supportable Square Feet of Retail Space Outside of Centers**

| Community Planning Area (CPA) | Subarea Group     | Estimated Resident Buying Power: Non-Center (\$2001) | Capture Rate <sup>1</sup> | Captured Sales (\$2001) | Assumed Sales per Sq. Ft. (\$2001) <sup>2</sup> | Estimated Supportable Sq. Ft. <sup>3</sup> | FAR Assumption <sup>4</sup> | Estimated Net Acreage <sup>5</sup> | Estimated Gross Acreage <sup>6</sup> |
|-------------------------------|-------------------|--|---------------------------|-------------------------|---|--|-----------------------------|------------------------------------|--------------------------------------|
| Alpine                        |                   | \$121,358,188  | 90%                       | \$109,222,369           | \$200   | 546,112                                    | 0.25                        | 50.15                              | 59.00                                |
| Barona                        |                   | n/a  | 90%                       | n/a                     | \$200   | n/a  | 0.25                        | n/a                                | n/a                                  |
| Bonsall                       | Bonsall           | 60,756,009   | 90%                       | 54,680,408              | \$200   | 273,402                                    | 0.25                        | 25.11                              | 29.54                                |
| Central Mountain              |                   | 489,429  | 90%                       | 440,486                 | \$200   | 2,202                                      | 0.16                        | 0.32                               | 0.37                                 |
| Central Mountain              | Cuyamaca          | 1,757,179  | 90%                       | 1,581,461               | \$200   | 7,907                                      | 0.16                        | 1.13                               | 1.33                                 |
| Central Mountain              | Descanso          | 5,759,168  | 90%                       | 5,183,251               | \$200   | 25,916                                     | 0.16                        | 3.72                               | 4.37                                 |
| Central Mountain              | Pine Valley       | 6,966,909  | 90%                       | 6,270,218               | \$200   | 31,351                                     | 0.16                        | 4.50                               | 5.29                                 |
| County Islands                |                   | 9,965,587  | 90%                       | 8,969,028               | \$200   | 44,845                                     | 0.25                        | 4.12                               | 4.84                                 |
| Crest/Dehesa                  |                   | 36,408,348   | 90%                       | 32,767,513              | \$200   | 163,838                                    | 0.25                        | 15.04                              | 17.70                                |
| Desert                        |                   | 5,050,507  | 90%                       | 4,545,456               | \$200   | 22,727                                     | 0.16                        | 3.26                               | 3.84                                 |
| Desert                        | Borrego Springs   | 43,195,206   | 90%                       | 38,875,685              | \$200   | 194,378                                    | 0.16                        | 27.89                              | 32.81                                |
| Fallbrook                     |                   | 180,350,371  | 90%                       | 162,315,334             | \$200   | 811,577                                    | 0.25                        | 74.52                              | 87.68                                |
| Jamul-Dulzura                 |                   | 72,632,156   | 90%                       | 65,368,941              | \$200   | 326,845                                    | 0.25                        | 30.01                              | 35.31                                |
| Julian                        |                   | 14,399,119   | 90%                       | 12,959,207              | \$200   | 64,796                                     | 0.16                        | 9.30                               | 10.94                                |
| Lakeside <sup>6</sup>         |                   | 219,717,992  | 90%                       | 197,746,193             | \$200   | 988,731                                    | 0.25                        | 90.79                              | 106.81                               |
| Mountain Empire               |                   | 520,589  | 90%                       | 468,530                 | \$200   | 2,343                                      | 0.16                        | 0.34                               | 0.40                                 |
| Mountain Empire               | Boulevard         | 5,834,550  | 90%                       | 5,251,095               | \$200   | 26,255                                     | 0.16                        | 3.77                               | 4.43                                 |
| Mountain Empire               | Jacumba           | 7,826,672  | 90%                       | 7,044,005               | \$200   | 35,220                                     | 0.16                        | 5.05                               | 5.95                                 |
| Mountain Empire               | Lake Morena/Campo | 10,048,484   | 90%                       | 9,043,635               | \$200   | 45,218                                     | 0.16                        | 6.49                               | 7.63                                 |
| Mountain Empire               | Potrero           | 4,258,320  | 90%                       | 3,832,488               | \$200   | 19,162                                     | 0.16                        | 2.75                               | 3.23                                 |
| Mountain Empire               | Tecate            | 924,425  | 90%                       | 831,983                 | \$200   | 4,160                                      | 0.16                        | 0.60                               | 0.70                                 |
| North County Metro            |                   | 178,576,720  | 90%                       | 160,719,048             | \$200   | 803,595                                    | 0.25                        | 73.79                              | 86.81                                |
| North County Metro            | Hidden Meadows    | 35,285,797   | 90%                       | 31,757,218              | \$200   | 158,786                                    | 0.25                        | 14.58                              | 17.15                                |
| North County Metro            | Twin Oaks         | 11,988,145   | 90%                       | 10,789,331              | \$200   | 53,947                                     | 0.25                        | 4.95                               | 5.83                                 |
| North Mountain                | North Mountain    | 17,824,501   | 90%                       | 16,042,051              | \$200   | 80,210                                     | 0.16                        | 11.51                              | 13.54                                |
| North Mountain                | Palomar Mountain  | 2,003,569  | 90%                       | 1,803,213               | \$200   | 9,016                                      | 0.16                        | 1.29                               | 1.52                                 |
| Otay                          |                   | 20,885,052   | 90%                       | 18,796,547              | \$200   | 93,983                                     | 0.16                        | 13.48                              | 15.86                                |
| Pala-Pauma                    | Pala-Pauma        | 30,548,177   | 90%                       | 27,493,359              | \$200   | 137,467                                    | 0.25                        | 12.62                              | 14.85                                |
| Pendleton-De Luz              |                   | 42,062,548   | 90%                       | 37,856,293              | \$200   | 189,281                                    | 0.25                        | 17.38                              | 20.45                                |
| Rainbow                       |                   | 8,830,458  | 90%                       | 7,947,412               | \$200   | 39,737                                     | 0.25                        | 3.65                               | 4.29                                 |
| Ramona                        |                   | 148,045,472  | 90%                       | 133,240,925             | \$200   | 666,205                                    | 0.25                        | 61.18                              | 71.97                                |
| San Diegoito                  |                   | 189,145,215  | 90%                       | 170,230,694             | \$200   | 851,153                                    | 0.25                        | 78.16                              | 91.95                                |
| Spring Valley                 |                   | 135,458,591  | 90%                       | 121,912,732             | \$200   | 609,564                                    | 0.25                        | 55.97                              | 65.85                                |
| Sweetwater                    |                   | 49,109,087   | 90%                       | 44,198,178              | \$200   | 220,991                                    | 0.25                        | 20.29                              | 23.87                                |
| Valle De Oro                  |                   | 156,948,758  | 90%                       | 141,253,883             | \$200   | 706,269                                    | 0.25                        | 64.85                              | 76.30                                |
| Valley Center                 |                   | 117,386,231  | 90%                       | 105,647,608             | \$200   | 528,238                                    | 0.25                        | 48.51                              | 57.07                                |
| <b>Total</b>                  |                   | <b>\$1,952,317,530</b>                               | <b>--</b>                 | <b>\$1,757,085,777</b>  | <b>--</b>                                       | <b>8,785,429</b>                           | <b>--</b>                   | <b>841.08</b>                      | <b>989.51</b>                        |

<sup>1</sup>Estimated percentage of resident expenditures likely to occur within CPA.

<sup>2</sup>Assumes an average rent of \$1.33/sq.ft per month.

<sup>3</sup>Estimated buying power divided by average sales per square foot.

<sup>4</sup>Based on average Floor Area Ratios (FAR) countywide (0.25 for communities within CWA and 0.16 for communities outside CWA).

<sup>5</sup>Net acreage equal to 85% of gross acreage.

<sup>6</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-17**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Total Supportable Retail Acres for Neighborhood, Community & Non-Center Outlets**

| Community Planning Area<br>(CPA) | Subarea Group     | Estimated Net<br>Acreage <sup>1</sup> | Estimated Gross<br>Acreage <sup>2</sup> |
|----------------------------------|-------------------|---------------------------------------|---|
| Alpine                           |                   | 88.51                                 | 104.13                                  |
| Barona                           |                   | n/a                                   | n/a                                     |
| Bonsall                          | Bonsall           | 44.31                                 | 52.13                                   |
| Central Mountain                 |                   | 0.56                                  | 0.66                                    |
| Central Mountain                 | Cuyamaca          | 2.00                                  | 2.36                                    |
| Central Mountain                 | Descanso          | 6.56                                  | 7.72                                    |
| Central Mountain                 | Pine Valley       | 7.94                                  | 9.34                                    |
| County Islands                   |                   | 7.27                                  | 8.55                                    |
| Crest/Dehesa                     |                   | 26.55                                 | 31.24                                   |
| Desert                           |                   | 5.76                                  | 6.77                                    |
| Desert                           | Borrego Springs   | 49.22                                 | 57.91                                   |
| Fallbrook                        |                   | 131.53                                | 154.74                                  |
| Jamul-Dulzura                    |                   | 52.97                                 | 62.32                                   |
| Julian                           |                   | 16.41                                 | 19.30                                   |
| Lakeside <sup>3</sup>            |                   | 160.24                                | 188.52                                  |
| Mountain Empire                  |                   | 0.59                                  | 0.70                                    |
| Mountain Empire                  | Boulevard         | 6.65                                  | 7.82                                    |
| Mountain Empire                  | Jacumba           | 8.92                                  | 10.49                                   |
| Mountain Empire                  | Lake Morena/Campo | 11.45                                 | 13.47                                   |
| Mountain Empire                  | Potrero           | 4.85                                  | 5.71                                    |
| Mountain Empire                  | Tecate            | 1.05                                  | 1.24                                    |
| North County Metro               |                   | 130.24                                | 153.22                                  |
| North County Metro               | Hidden Meadows    | 25.73                                 | 30.28                                   |
| North County Metro               | Twin Oaks         | 8.74                                  | 10.29                                   |
| North Mountain                   | North Mountain    | 20.31                                 | 23.90                                   |
| North Mountain                   | Palomar Mountain  | 2.28                                  | 2.69                                    |
| Otay                             |                   | 23.80                                 | 28.00                                   |
| Pala-Pauma                       | Pala-Pauma        | 22.28                                 | 26.21                                   |
| Pendleton-De Luz                 |                   | 30.68                                 | 36.09                                   |
| Rainbow                          |                   | 6.44                                  | 7.58                                    |
| Ramona                           |                   | 107.97                                | 127.03                                  |
| San Dieguito                     |                   | 137.95                                | 162.29                                  |
| Spring Valley                    |                   | 98.79                                 | 116.23                                  |
| Sweetwater                       |                   | 35.82                                 | 42.14                                   |
| Valle De Oro                     |                   | 114.47                                | 134.67                                  |
| Valley Center                    |                   | 85.61                                 | 100.72                                  |
| <b>Total</b>                     |                   | <b>1,484.47</b>                       | <b>1,746.44</b>                         |

<sup>1</sup>Based on an estimated Floor Area Ratio (FAR) of 0.25

<sup>2</sup>Net acreage equal to 85% of gross acreage.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), and Economics Research Associates.

**Table B-18**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**  
**Retail Land Comparison: Current Developed Retail Acres & Forecasted Supportable Retail Acres**

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Current Developed Retail Acres with Estimated Future Supportable Acres <sup>1</sup> |                   |
|-------------------------------|-------------------|---|---|-------------------|
|                               |                   |   | Current Developed Retail Acres  | Surplus/(Deficit) |
| Alpine                        |                   | 104.13  | 83.04   | (21.09)           |
| Barona                        |                   | n/a   | n/a   | n/a               |
| Bonsall                       | Bonsall           | 52.13   | 28.31   | (23.82)           |
| Central Mountain              |                   | 0.66  | 0.00  | (0.66)            |
| Central Mountain              | Cuyamaca          | 2.36  | 1.48  | (0.88)            |
| Central Mountain              | Descanso          | 7.72  | 4.85  | (2.87)            |
| Central Mountain              | Pine Valley       | 9.34  | 16.81   | 7.47              |
| County Islands                |                   | 8.55  | 1.16  | (7.39)            |
| Crest/Dehesa                  |                   | 31.24   | 5.61  | (25.63)           |
| Desert                        |                   | 6.77  | 0.00  | (6.77)            |
| Desert                        | Borrego Springs   | 57.91   | 64.37   | 6.46              |
| Fallbrook                     |                   | 154.74  | 110.58  | (44.16)           |
| Jamul-Dulzura                 |                   | 62.32   | 22.14   | (40.18)           |
| Julian                        |                   | 19.30   | 30.67   | 11.37             |
| Lakeside <sup>3</sup>         |                   | 188.52  | 212.43  | 23.91             |
| Mountain Empire               |                   | 0.70  | 0.00  | (0.70)            |
| Mountain Empire               | Boulevard         | 7.82  | 30.41   | 22.59             |
| Mountain Empire               | Jacumba           | 10.49   | 12.67   | 2.18              |
| Mountain Empire               | Lake Morena/Campo | 13.47   | 16.44   | 2.97              |
| Mountain Empire               | Potrero           | 5.71  | 1.27  | (4.44)            |
| Mountain Empire               | Tecate            | 1.24  | 3.65  | 2.41              |
| North County Metro            |                   | 153.22  | 21.94   | (131.28)          |
| North County Metro            | Hidden Meadows    | 30.28   | 1.28  | (29.00)           |
| North County Metro            | Twin Oaks         | 10.29   | 1.06  | (9.23)            |
| North Mountain                | North Mountain    | 23.90   | 21.64   | (2.26)            |
| North Mountain                | Palomar Mountain  | 2.69  | 3.45  | 0.76              |
| Otay                          |                   | 28.00   | 0.00  | (28.00)           |
| Pala-Pauma                    | Pala-Pauma        | 26.21   | 5.67  | (20.54)           |
| Pendleton-De Luz              |                   | 36.09   | 69.68   | 33.59             |
| Rainbow                       |                   | 7.58  | 6.82  | (0.76)            |
| Ramona                        |                   | 127.03  | 129.69  | 2.66              |
| San Dieguito                  |                   | 162.29  | 28.33   | (133.96)          |
| Spring Valley                 |                   | 116.23  | 129.67  | 13.44             |
| Sweetwater                    |                   | 42.14   | 10.19   | (31.95)           |
| Valle De Oro                  |                   | 134.67  | 169.88  | 35.21             |
| Valley Center                 |                   | 100.72  | 27.41   | (73.31)           |
| <b>Total</b>                  |                   | <b>1,746.44</b>   | <b>1,272.60</b>   | <b>(473.84)</b>   |

<sup>1</sup>Includes only neighborhood, community, and non-center retail acres; provided by Technology Associates International Corporation.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

**Table B-19**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**

**Retail Land Comparison: Retail Land Allowed Under Current General Plan & Forecasted Supportable Retail Acres**

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Current General Plan with Estimated Future Supportable Acres <sup>1</sup> |                   |
|-------------------------------|-------------------|---|---|-------------------|
|                               |                   |   | Estimated Gross Acreage Allowed under Current GP  | Surplus/(Deficit) |
| Alpine                        |                   | 104.13  | 110.18  | 6.05              |
| Barona                        |                   | n/a   | n/a   | n/a               |
| Bonsall                       | Bonsall           | 52.13   | 125.72  | 73.59             |
| Central Mountain              |                   | 0.66  | 0.00  | (0.66)            |
| Central Mountain              | Cuyamaca          | 2.36  | 0.00  | (2.36)            |
| Central Mountain              | Descanso          | 7.72  | 5.46  | (2.26)            |
| Central Mountain              | Pine Valley       | 9.34  | 17.10   | 7.76              |
| County Islands                |                   | 8.55  | 1.10  | (7.45)            |
| Crest/Dehesa                  |                   | 31.24   | 13.68   | (17.56)           |
| Desert                        |                   | 6.77  | 0.00  | (6.77)            |
| Desert                        | Borrego Springs   | 57.91   | 333.51  | 275.60            |
| Fallbrook                     |                   | 154.74  | 236.51  | 81.77             |
| Jamul-Dulzura                 |                   | 62.32   | 87.38   | 25.06             |
| Julian                        |                   | 19.30   | 75.03   | 55.73             |
| Lakeside <sup>3</sup>         |                   | 188.52  | 380.77  | 192.25            |
| Mountain Empire               |                   | 0.70  | 28.50   | 27.80             |
| Mountain Empire               | Boulevard         | 7.82  | 121.18  | 113.36            |
| Mountain Empire               | Jacumba           | 10.49   | 18.20   | 7.71              |
| Mountain Empire               | Lake Morena/Campo | 13.47   | 48.20   | 34.73             |
| Mountain Empire               | Potrero           | 5.71  | 14.94   | 9.23              |
| Mountain Empire               | Tecate            | 1.24  | 40.23   | 38.99             |
| North County Metro            |                   | 153.22  | 36.90   | (116.32)          |
| North County Metro            | Hidden Meadows    | 30.28   | 39.30   | 9.02              |
| North County Metro            | Twin Oaks         | 10.29   | 22.60   | 12.31             |
| North Mountain                | North Mountain    | 23.90   | 13.01   | (10.89)           |
| North Mountain                | Palomar Mountain  | 2.69  | 0.00  | (2.69)            |
| Otay                          |                   | 28.00   | 111.20  | 83.20             |
| Pala-Pauma                    | Pala-Pauma        | 26.21   | 37.08   | 10.87             |
| Pendleton-De Luz              |                   | 36.09   | 0.00  | (36.09)           |
| Rainbow                       |                   | 7.58  | 31.95   | 24.37             |
| Ramona                        |                   | 127.03  | 274.25  | 147.22            |
| San Dieguito                  |                   | 162.29  | 45.05   | (117.24)          |
| Spring Valley                 |                   | 116.23  | 205.37  | 89.14             |
| Sweetwater                    |                   | 42.14   | 29.92   | (12.22)           |
| Valle De Oro                  |                   | 134.67  | 219.73  | 85.06             |
| Valley Center                 |                   | 100.72  | 100.21  | (0.51)            |
| <b>Total</b>                  |                   | <b>1,746.4</b>  | <b>2,824.26</b>   | <b>1,077.83</b>   |

<sup>1</sup>Includes only neighborhood, community, and non-center retail acres; provided by Technology Associates International Corporation.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

**Table B-20**  
**Sensitivity Analysis Scenario 1: Retail Sales @ \$200/Sq. Ft.**

**Retail Land Comparison: Retail Land Allowed Under Proposed General Plan & Forecasted Supportable Retail Acres**

| Community Planning Area (CPA) | Subarea Group     | Estimated Gross Resident Supported Retail Acres At Build-out <sup>2</sup> | Comparison of Proposed General Plan with Estimated Future Supportable Acres <sup>1</sup> |                   |
|-------------------------------|-------------------|---|--|-------------------|
|                               |                   |   | Estimated Gross Acreage Allowed under Proposed GP  | Surplus/(Deficit) |
| Alpine                        |                   | 104.13  | 134.46   | 30.33             |
| Barona                        |                   | n/a   | 0.00   | n/a               |
| Bonsall                       | Bonsall           | 52.13   | 127.77   | 75.64             |
| Central Mountain              |                   | 0.66  | 0.00   | (0.66)            |
| Central Mountain              | Cuyamaca          | 2.36  | 1.98   | (0.38)            |
| Central Mountain              | Descanso          | 7.72  | 6.63   | (1.09)            |
| Central Mountain              | Pine Valley       | 9.34  | 19.09  | 9.75              |
| County Islands                |                   | 8.55  | 0.00   | (8.55)            |
| Crest/Dehesa                  |                   | 31.24   | 17.01  | (14.23)           |
| Desert                        |                   | 6.77  | 18.79  | 12.02             |
| Desert                        | Borrego Springs   | 57.91   | 281.51   | 223.60            |
| Fallbrook                     |                   | 154.74  | 240.18   | 85.44             |
| Jamul-Dulzura                 |                   | 62.32   | 88.28  | 25.96             |
| Julian                        |                   | 19.30   | 71.65  | 52.35             |
| Lakeside <sup>3</sup>         |                   | 188.52  | 380.77   | 192.25            |
| Mountain Empire               |                   | 0.70  | 28.50  | 27.80             |
| Mountain Empire               | Boulevard         | 7.82  | 122.17   | 114.35            |
| Mountain Empire               | Jacumba           | 10.49   | 24.50  | 14.01             |
| Mountain Empire               | Lake Morena/Campo | 13.47   | 51.39  | 37.92             |
| Mountain Empire               | Potrero           | 5.71  | 24.30  | 18.59             |
| Mountain Empire               | Tecate            | 1.24  | 54.72  | 53.48             |
| North County Metro            |                   | 153.22  | 53.55  | (99.67)           |
| North County Metro            | Hidden Meadows    | 30.28   | 2.07   | (28.21)           |
| North County Metro            | Twin Oaks         | 10.29   | 39.45  | 29.16             |
| North Mountain                | North Mountain    | 23.90   | 38.07  | 14.17             |
| North Mountain                | Palomar Mountain  | 2.69  | 1.53   | (1.16)            |
| Otay                          |                   | 28.00   | 111.20   | 83.20             |
| Pala-Pauma                    | Pala-Pauma        | 26.21   | 36.36  | 10.15             |
| Pendleton-De Luz              |                   | 36.09   | 0.00   | (36.09)           |
| Rainbow                       |                   | 7.58  | 41.22  | 33.64             |
| Ramona                        |                   | 127.03  | 336.63   | 209.60            |
| San Dieguito                  |                   | 162.29  | 44.65  | (117.64)          |
| Spring Valley                 |                   | 116.23  | 200.78   | 84.55             |
| Sweetwater                    |                   | 42.14   | 29.92  | (12.22)           |
| Valle De Oro                  |                   | 134.67  | 218.66   | 83.99             |
| Valley Center                 |                   | 100.72  | 215.53   | 114.81            |
| <b>Total</b>                  |                   | <b>1,746.4</b>  | <b>3,063.32</b>  | <b>1,316.89</b>   |

<sup>1</sup>Includes Neighborhood Commercial, Service Commercial, and Rural Commercial designated lands, two-thirds of General Commercial lands, for the July 2004 Baseline General Plan Scenario, plus an assumed share of Specific Plan Areas per County staff estimates in 2002.

<sup>2</sup>Neighborhood and community serving only. Regional/Superregional not included as these are likely to occur in more urbanized areas.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

**Table C-1  
Projected Demand for Industrial Space by County CPA, 2020**

**Industrial Space Demand by CPA:**

|                                     |     |
|-------------------------------------|-----|
| <b>Space Per Employee (sq.ft.):</b> | 500 |
|-------------------------------------|-----|

| <b>Community Planning Area (CPA)</b> | <b>Subarea Group</b> | <b>Projected 2020 Employment<sup>1</sup></b> | <b>Space Demand in 2020 (s.f.)</b> | <b>Net Land Area Demand in 2020 (acres)<sup>2</sup></b> | <b>Gross Land Area Demand in 2020 (acres)<sup>3</sup></b> |
|--------------------------------------|----------------------|--|------------------------------------|---|---|
| Alpine                               |                      | 705  | 352,715                            | 17.99   | 25.71   |
| Barona                               |                      | 197  | 98,250                             | 5.01  | 7.16  |
| Bonsall                              | Bonsall              | 642  | 321,080                            | 16.38   | 23.40   |
| Central Mountain                     |                      | 133  | 66,555                             | 3.40  | 4.85  |
| County Islands                       |                      | 55   | 27,335                             | 1.39  | 1.99  |
| Crest/Dehesa                         |                      | 443  | 221,660                            | 11.31   | 16.15   |
| Desert                               |                      | 1,504  | 752,180                            | 38.37   | 54.82   |
| Desert                               | Borrego Springs      | n/a  | n/a                                | n/a   | n/a   |
| Fallbrook                            |                      | 3,208  | 1,604,130                          | 81.84   | 116.91  |
| Jamul-Dulzura                        |                      | 487  | 243,655                            | 12.43   | 17.76   |
| Julian                               |                      | 270  | 134,780                            | 6.88  | 9.82  |
| Lakeside <sup>4</sup>                |                      | 3,821  | 1,910,315                          | 97.46   | 243.64  |
| Mountain Empire                      |                      | 697  | 348,450                            | 17.78   | 25.39   |
| North County Metro                   |                      | 2,638  | 1,318,885                          | 67.28   | 96.12   |
| North Mountain                       | North Mountain       | 122  | 61,080                             | 3.12  | 4.45  |
| Otay                                 |                      | 512  | 255,875                            | 13.05   | 18.65   |
| Pala-Pauma                           | Pala-Pauma           | 403  | 201,310                            | 10.27   | 14.67   |
| Pendleton-De Luz                     |                      | 779  | 389,360                            | 19.86   | 28.38   |
| Rainbow                              |                      | 175  | 87,610                             | 4.47  | 6.38  |
| Ramona                               |                      | 1,982  | 991,165                            | 50.56   | 72.23   |
| San Dieguito                         |                      | 1,974  | 986,900                            | 50.35   | 71.92   |
| Spring Valley                        |                      | 2,288  | 1,143,815                          | 58.35   | 83.36   |
| Sweetwater                           |                      | 363  | 181,340                            | 9.25  | 13.22   |
| Valle De Oro                         |                      | 1,026  | 513,240                            | 26.18   | 37.40   |
| Valley Center                        |                      | 849  | 424,505                            | 21.66   | 30.94   |
| <b>CPA Total</b>                     |                      | 25,272                                       | 12,636,190                         | 645   | 1,025.33  |

<sup>1</sup>Based on SANDAG Subregional Forecast (2020 Cities/County Forecast); Employment in industries using industrial space includes 97% of manufacturing; 20% of construction; 40% of transportation, communications & public utilities; 100% of wholesale trade; and 25% of services.

<sup>2</sup>Based on a site coverage ratio of 45%.

<sup>3</sup>Based on a site net to gross ratio of 70%, except Lakeside which is an assumed 40% per County staff.

<sup>4</sup>Pepper Drive/Bostonia merged into Lakeside CPA.

Source: Economics Research Associates

Table C-2

Employment Land Comparison: Current Developed Industrial Acres & 2020 Supportable Industrial Acres

| Community Planning Area (CPA) | Subarea Group  | 2020 Estimated Gross Supportable Industrial Acres | Comparison of Currently Developed Industrial Acres with Estimated Future Supportable Acres |                        |
|-------------------------------|----------------|---|--|------------------------|
|                               |                |   | Currently Developed Industrial Acres <sup>1</sup>  | 2020 Surplus/(Deficit) |
| Alpine                        |                | 25.7  | 5.7  | (20.0)                 |
| Barona                        |                | n/a   | n/a  | n/a                    |
| Bonsall                       | Bonsall        | 23.4  | 1.1  | (22.3)                 |
| Central Mountain              |                | 4.9   | 0.0  | (4.9)                  |
| County Islands                |                | 2.0   | 3.1  | 1.1                    |
| Crest/Dehesa                  |                | 16.2  | 0.3  | (15.8)                 |
| Desert                        |                | 54.8  | 1.2  | (53.6)                 |
| Fallbrook                     |                | 116.9   | 54.5   | (62.4)                 |
| Jamul-Dulzura                 |                | 17.8  | 6.2  | (11.5)                 |
| Julian                        |                | 9.8   | 0.0  | (9.8)                  |
| Lakeside <sup>2</sup>         |                | 243.6   | 261.2  | 17.5                   |
| Mountain Empire               |                | 25.4  | 33.6   | 8.2                    |
| North County Metro            |                | 96.1  | 93.3   | (2.8)                  |
| North Mountain                | North Mountain | 4.5   | 0.7  | (3.8)                  |
| Otay                          |                | 18.6  | 0.1  | (18.6)                 |
| Pala-Pauma                    | Pala-Pauma     | 14.7  | 10.0   | (4.6)                  |
| Pendleton-De Luz              |                | 28.4  | 189.9  | 161.5                  |
| Rainbow                       |                | 6.4   | 4.2  | (2.1)                  |
| Ramona                        |                | 72.2  | 61.2   | (11.0)                 |
| San Diego                     |                | 71.9  | 123.4  | 51.5                   |
| Spring Valley                 |                | 83.4  | 217.1  | 133.8                  |
| Sweetwater                    |                | 13.2  | 0.0  | (13.2)                 |
| Valle De Oro                  |                | 37.4  | 2.2  | (35.2)                 |
| Valley Center                 |                | 30.9  | 26.8   | (4.1)                  |
| <b>Total</b>                  |                | <b>1,018.2</b>                                    | <b>1,095.7</b>   | <b>77.5</b>            |

<sup>1</sup>From SANDAG 2001 GIS Database; includes SANDAG Land Use Categories (Codes) Industrial Parks (2101), Light Industry-General (2103), Warehousing & Public Storage (2104), Wholesale Trade (5001), and Industrial Under Construction (9503). Communications and Utilities (4113) was omitted as it encompasses large acreages which appear to be right-of-ways.

<sup>2</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, SANDAG 2001 GIS Database, and Economics Research Associates.

**Table C-3**

**Employment Land Comparison: Industrial Land Allowed Under Current General Plan & 2020 Supportable Industrial Acres**

| Community Planning Area (CPA) | Subarea Group | 2020 Estimated Gross Supportable Industrial Acres | Comparison of Current General Plan with Estimated Future Supportable Acres |                        |
|-------------------------------|---------------|---|--|------------------------|
|                               |               |   | Estimated Gross Acreage Allowed under Current GP <sup>1</sup>              | 2020 Surplus/(Deficit) |
| Alpine                        | Bonsall       | 25.7  | 118.3  | 92.6                   |
| Barona                        |               | n/a   | n/a  | n/a                    |
| Bonsall                       |               | 23.4  | 0.0  | (23.4)                 |
| Central Mountain              |               | 4.9   | 15.0   | 10.2                   |
| County Islands                |               | 2.0   | 1.0  | (1.0)                  |
| Crest/Dehesa                  |               | 16.2  | 0.0  | (16.2)                 |
| Desert                        |               | 54.8  | 195.2  | 140.4                  |
| Fallbrook                     |               | 116.9   | 172.3  | 55.4                   |
| Jamul-Dulzura                 |               | 17.8  | 6.4  | (11.4)                 |
| Julian                        |               | 9.8   | 46.9   | 37.0                   |
| Lakeside <sup>2</sup>         |               | 243.6   | 1,122.6  | 878.9                  |
| Mountain Empire               |               | 25.4  | 225.6  | 200.2                  |
| North County Metro            |               | 96.1  | 91.4   | (4.7)                  |
| North Mountain                |               | North Mountain                                    | 4.5  | 8.5                    |
| Otay                          | 18.6          |   | 2,289.3  | 2,270.7                |
| Pala-Pauma                    | Pala-Pauma    | 14.7  | 0.0  | (14.7)                 |
| Pendleton-De Luz              |               | 28.4  | 0.0  | (28.4)                 |
| Rainbow                       |               | 6.4   | 0.0  | (6.4)                  |
| Ramona                        |               | 72.2  | 341.1  | 268.8                  |
| San Dieguito                  |               | 71.9  | 159.0  | 87.1                   |
| Spring Valley                 |               | 83.4  | 362.3  | 279.0                  |
| Sweetwater                    |               | 13.2  | 0.0  | (13.2)                 |
| Valle De Oro                  |               | 37.4  | 1.8  | (35.6)                 |
| Valley Center                 | 30.9          | 124.9   | 93.9   |                        |
| <b>Total</b>                  |               | <b>1,018.2</b>                                    | <b>5,281.5</b>   | <b>4,263.3</b>         |

<sup>1</sup>Includes portions of lands classified as Service Commercial (80%), Limited Impact Industrial (90%), General Impact Industrial (100%), and relevant SPAs. Provided by County of San Diego and Technology Associates International Corporation.

<sup>2</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, Consumer Expenditures in 2000 (Bureau of Labor Statistics, US Department of Labor), SANDAG 2001 GIS Database, and Economics Research Associates.

Table C-4

**Employment Land Comparison: Industrial Land Allowed Under Proposed Baseline General Plan Scenario & 2020 Supportable Industrial Acres**

| Community Planning Area (CPA) | Subarea Group  | 2020 Estimated Gross Supportable Industrial Acres <sup>2</sup> | Comparison of Proposed General Plan with Estimated Future Supportable Acres <sup>1</sup> |                        |
|-------------------------------|----------------|--|--|------------------------|
|                               |                |  | Estimated Gross Acreage Allowed under Proposed GP  | 2020 Surplus/(Deficit) |
| Alpine                        |                | 25.71  | 131.9  | 106.2                  |
| Barona                        |                | n/a  | n/a  | n/a                    |
| Bonsall                       | Bonsall        | 23.40  | 0.0  | (23.4)                 |
| Central Mountain              |                | 4.85   | 12.9   | 8.0                    |
| County Islands                |                | 1.99   | 54.7   | 52.7                   |
| Crest/Dehesa                  |                | 16.15  | 0.0  | (16.2)                 |
| Desert                        |                | 54.82  | 60.9   | 6.1                    |
| Fallbrook                     |                | 116.91   | 477.5  | 360.6                  |
| Jamul-Dulzura                 |                | 17.76  | 4.9  | (12.9)                 |
| Julian                        |                | 9.82   | 48.1   | 38.3                   |
| Lakeside <sup>3</sup>         |                | 243.64   | 1,122.6  | 878.9                  |
| Mountain Empire               |                | 25.39  | 242.8  | 217.4                  |
| North County Metro            |                | 96.12  | 48.9   | (47.2)                 |
| North Mountain                | North Mountain | 4.45   | 0.0  | (4.5)                  |
| Otay                          |                | 18.65  | 2,289.3  | 2,270.7                |
| Pala-Pauma                    | Pala-Pauma     | 14.67  | 0.0  | (14.7)                 |
| Pendleton-De Luz              |                | 28.38  | 0.0  | (28.4)                 |
| Rainbow                       |                | 6.38   | 0.0  | (6.4)                  |
| Ramona                        |                | 72.23  | 226.9  | 154.6                  |
| San Dieguito                  |                | 71.92  | 159.0  | 87.1                   |
| Spring Valley                 |                | 83.36  | 294.9  | 211.6                  |
| Sweetwater                    |                | 13.22  | 0.0  | (13.2)                 |
| Valle De Oro                  |                | 37.40  | 2.0  | (35.4)                 |
| Valley Center                 |                | 30.94  | 95.6   | 64.6                   |
| <b>Total</b>                  |                | <b>1,018.2</b>   | <b>5,272.9</b>   | <b>4,254.7</b>         |

<sup>1</sup>Based on estimates shown in Table 13.

<sup>2</sup>Includes portions of lands classified as Service Commercial (80%), Limited Impact Industrial (90%), General Impact Industrial (100%), and relevant SPAs. Provided by County of San Diego and Technology Associates International Corporation.

<sup>3</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, SANDAG 2001 GIS Database, and Economics Research Associates.

**Table C-5  
Projected Demand for Office Space by County CPA, 2020**

**Office Space Demand by CPA:**

|                                     |     |
|-------------------------------------|-----|
| <b>Space Per Employee (sq.ft.):</b> | 190 |
|-------------------------------------|-----|

**Office Space Demand by CPA:**

| <b>Community Planning Area (CPA)</b> | <b>Subarea Group</b> | <b>Projected Employment<sup>1</sup></b> | <b>Space Demand for Period (s.f.)</b> | <b>Net Space Demand for Period (acres)<sup>2</sup></b> | <b>Gross Space Demand for Period (acres)<sup>3</sup></b> |
|--------------------------------------|----------------------|---|---------------------------------------|--|--|
| Alpine                               |                      | 991                                     | 188,294                               | 11.38  | 16.25  |
| Barona                               |                      | n/a                                     | n/a                                   | n/a  | n/a  |
| Bonsall                              | Bonsall              | 531                                     | 100,898                               | 6.10   | 8.71   |
| Central Mountain                     |                      | 133                                     | 25,183                                | 1.52   | 2.17   |
| County Islands                       |                      | 151                                     | 28,686                                | 1.73   | 2.48   |
| Crest/Dehesa                         |                      | 586                                     | 111,346                               | 6.73   | 9.61   |
| Desert                               |                      | 1,757                                   | 333,914                               | 20.17  | 28.82  |
| Fallbrook                            |                      | 2,416                                   | 459,019                               | 27.73  | 39.62  |
| Jamul-Dulzura                        |                      | 358                                     | 67,971                                | 4.11   | 5.87   |
| Julian                               |                      | 223                                     | 42,311                                | 2.56   | 3.65   |
| Lakeside <sup>4</sup>                |                      | 2,834                                   | 538,416                               | 32.53  | 46.47  |
| Mountain Empire                      |                      | 559                                     | 106,239                               | 6.42   | 9.17   |
| North County Metro                   |                      | 1,803                                   | 342,576                               | 20.70  | 29.57  |
| North Mountain                       | North Mountain       | 175                                     | 33,277                                | 2.01   | 2.87   |
| Otay                                 |                      | 583                                     | 110,685                               | 6.69   | 9.55   |
| Pala-Pauma                           | Pala-Pauma           | 206                                     | 39,174                                | 2.37   | 3.38   |
| Pendleton-De Luz                     |                      | 675                                     | 128,313                               | 7.75   | 11.07  |
| Rainbow                              |                      | 56                                      | 10,579                                | 0.64   | 0.91   |
| Ramona                               |                      | 1,808                                   | 343,448                               | 20.75  | 29.64  |
| San Dieguito                         |                      | 2,042                                   | 387,933                               | 23.44  | 33.48  |
| Spring Valley                        |                      | 1,680                                   | 319,270                               | 19.29  | 27.55  |
| Sweetwater                           |                      | 622                                     | 118,136                               | 7.14   | 10.20  |
| Valle De Oro                         |                      | 1,387                                   | 263,543                               | 15.92  | 22.74  |
| Valley Center                        |                      | 600                                     | 114,074                               | 6.89   | 9.85   |
| <b>CPA Total</b>                     |                      | 22,175                                  | 4,213,282                             | 254.54   | 363.62   |

<sup>1</sup>Based on SANDAG Subregional Forecast (2020 Cities/County Forecast); Employment in industries using office space includes 3% of manufacturing; 35% of transportation, communications & public utilities; 100% of finance, insurance & real estate; 35% of services (including medical); and 5% of self-employment.

<sup>2</sup>Based on a site coverage ratio of 38%.

<sup>3</sup>Based on a site net to gross ratio of 70%.

<sup>4</sup>Pepper Drive/Bostonia merged into Lakeside CPA.

Source: Economics Research Associates

Table C-6

Employment Land Comparison: Current Developed Office Acres & 2020 Supportable Office Acres

| Community Planning Area (CPA) | Subarea Group  | Estimated Gross Supportable Office Acres | Comparison of Current Developed Office Acres with Estimated Future Supportable Acres |                        |
|-------------------------------|----------------|--|--|------------------------|
|                               |                |  | Current Developed Office Acres <sup>1</sup>  | 2020 Surplus/(Deficit) |
| Alpine                        |                | 16.25                                    | 5.1  | (11.1)                 |
| Barona                        |                | n/a                                      | n/a  | n/a                    |
| Bonsall                       | Bonsall        | 8.71                                     | 0.0  | (8.7)                  |
| Central Mountain              |                | 2.17                                     | 0.0  | (2.2)                  |
| County Islands                |                | 2.48                                     | 0.0  | (2.5)                  |
| Crest/Dehesa                  |                | 9.61                                     | 0.7  | (8.9)                  |
| Desert                        |                | 28.82                                    | 0.4  | (28.4)                 |
| Fallbrook                     |                | 39.62                                    | 24.3   | (15.3)                 |
| Jamul-Dulzura                 |                | 5.87                                     | 2.0  | (3.9)                  |
| Julian                        |                | 3.65                                     | 0.0  | (3.7)                  |
| Lakeside <sup>2</sup>         |                | 46.47                                    | 23.4   | (23.0)                 |
| Mountain Empire               |                | 9.17                                     | 0.0  | (9.2)                  |
| North County Metro            |                | 29.57                                    | 0.0  | (29.6)                 |
| North Mountain                | North Mountain | 2.87                                     | 7.2  | 4.4                    |
| Otay                          |                | 9.55                                     | 0.0  | (9.6)                  |
| Pala-Pauma                    | Pala-Pauma     | 3.38                                     | 0.0  | (3.4)                  |
| Pendleton-De Luz              |                | 11.07                                    | 38.9   | 27.9                   |
| Rainbow                       |                | 0.91                                     | 0.0  | (0.9)                  |
| Ramona                        |                | 29.64                                    | 13.5   | (16.1)                 |
| San Dieguito                  |                | 33.48                                    | 28.6   | (4.9)                  |
| Spring Valley                 |                | 27.55                                    | 3.7  | (23.9)                 |
| Sweetwater                    |                | 10.20                                    | 5.8  | (4.4)                  |
| Valle De Oro                  |                | 22.74                                    | 3.8  | (18.9)                 |
| Valley Center                 |                | 9.85                                     | 9.5  | (0.4)                  |
| <b>Total</b>                  |                | <b>363.62</b>                            | <b>167.5</b>   | <b>(196.6)</b>         |

<sup>1</sup>Includes lands designated as Low-Rise Office (per SANDAG's 2001 GIS Database).

<sup>2</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, SANDAG 2001 GIS Database, and Economics Research Associates.

Table C-7

Employment Land Comparison: Office Land Allowed Under Current General Plan & 2020 Supportable Office Acres

| Community Planning Area (CPA) | Subarea Group  | Estimated Gross Supportable Office Acres | Comparison of Current General Plan with Estimated Future Supportable Acres |                        |
|-------------------------------|----------------|--|--|------------------------|
|                               |                |  | Estimated Gross Acreage Allowed under Current GP <sup>1</sup>              | 2020 Surplus/(Deficit) |
| Alpine                        |                | 16.25                                    | 29.6   | 13.4                   |
| Barona                        |                | n/a                                      | n/a  | n/a                    |
| Bonsall                       | Bonsall        | 8.71                                     | 43.1   | 34.4                   |
| Central Mountain              |                | 2.17                                     | 10.1   | 7.9                    |
| County Islands                |                | 2.48                                     | 0.1  | (2.4)                  |
| Crest/Dehesa                  |                | 9.61                                     | 1.5  | (8.1)                  |
| Desert                        |                | 28.82                                    | 99.1   | 70.2                   |
| Fallbrook                     |                | 39.62                                    | 86.9   | 47.3                   |
| Jamul-Dulzura                 |                | 5.87                                     | 6.2  | 0.4                    |
| Julian                        |                | 3.65                                     | 7.9  | 4.3                    |
| Lakeside <sup>2</sup>         |                | 46.47                                    | 70.5   | 24.0                   |
| Mountain Empire               |                | 9.17                                     | 51.4   | 42.2                   |
| North County Metro            |                | 29.57                                    | 23.2   | (6.3)                  |
| North Mountain                | North Mountain | 2.87                                     | 4.3  | 1.4                    |
| Otay                          |                | 9.55                                     | 141.5  | 131.9                  |
| Pala-Pauma                    | Pala-Pauma     | 3.38                                     | 4.1  | 0.7                    |
| Pendleton-De Luz              |                | 11.07                                    | 0.0  | (11.1)                 |
| Rainbow                       |                | 0.91                                     | 3.6  | 2.6                    |
| Ramona                        |                | 29.64                                    | 132.8  | 103.1                  |
| San Dieguito                  |                | 33.48                                    | 45.6   | 12.2                   |
| Spring Valley                 |                | 27.55                                    | 63.2   | 35.7                   |
| Sweetwater                    |                | 10.20                                    | 18.0   | 7.8                    |
| Valle De Oro                  |                | 22.74                                    | 51.9   | 29.2                   |
| Valley Center                 |                | 9.85                                     | 18.2   | 8.4                    |
| <b>Total</b>                  |                | <b>363.6</b>                             | <b>912.9</b>   | <b>549.2</b>           |

<sup>1</sup>Includes portions of lands designated as Office Professional (100%), General Commercial (10%), Service Commercial, and Rural Commercial (10%), and Limited Impact Industrial (10%), and relevant SPAs (provided by County staff and Technology Associates International Corporation).

<sup>2</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, SANDAG 2001 GIS Database, and Economics Research Associates.

**Table C-8**

**Employment Land Comparison: Office Land Allowed Under Proposed Baseline General Plan Scenario & 2020 Supportable Office Acres**

| Community Planning Area (CPA) | Subarea Group | Estimated Gross Supportable Office Acres | Comparison of Proposed General Plan with Estimated Future Supportable Acres |                        |
|-------------------------------|---------------|--|---|------------------------|
|                               |               |  | Estimated Gross Acreage Allowed under Proposed GP <sup>1</sup>              | 2020 Surplus/(Deficit) |
| Alpine                        | Bonsall       | 16.25                                    | 25.7  | 9.4                    |
| Barona                        |               | n/a                                      | n/a   | n/a                    |
| Bonsall                       |               | 8.71                                     | 45.0  | 36.3                   |
| Central Mountain              |               | 2.17                                     | 7.2   | 5.0                    |
| County Islands                |               | 2.48                                     | 6.1   | 3.6                    |
| Crest/Dehesa                  |               | 9.61                                     | 1.9   | (7.7)                  |
| Desert                        |               | 28.82                                    | 49.3  | 20.5                   |
| Fallbrook                     |               | 39.62                                    | 116.0   | 76.4                   |
| Jamul-Dulzura                 |               | 5.87                                     | 17.2  | 11.4                   |
| Julian                        |               | 3.65                                     | 11.3  | 7.6                    |
| Lakeside <sup>2</sup>         |               | 46.47                                    | 70.5  | 24.0                   |
| Mountain Empire               |               | 9.17                                     | 35.1  | 25.9                   |
| North County Metro            |               | 29.57                                    | 206.2   | 176.6                  |
| Otay                          |               | 9.55                                     | 141.5   | 131.9                  |
| Pala-Pauma                    |               | Pala-Pauma                               | 3.38  | 4.1                    |
| Pendleton-De Luz              | 11.07         |  | 0.0   | (11.1)                 |
| Rainbow                       | 0.91          |  | 4.6   | 3.7                    |
| Ramona                        | 29.64         |  | 68.8  | 39.1                   |
| San Dieguito                  | 33.48         |  | 45.6  | 12.2                   |
| Spring Valley                 | 27.55         |  | 48.5  | 21.0                   |
| Sweetwater                    | 10.20         |  | 17.8  | 7.6                    |
| Valle De Oro                  | 22.74         |  | 52.1  | 29.3                   |
| Valley Center                 | 9.85          |  | 34.5  | 24.7                   |
| <b>Total</b>                  |               |  | <b>363.6</b>  | <b>1,044.5</b>         |

<sup>1</sup>Includes portions of lands designated as Office Professional (100%), General Commercial (10%), Service Commercial, and Rural Commercial (10%), and Limited Impact Industrial (10%), and relevant SPAs (provided by County staff and Technology Associates International Corporation).

<sup>2</sup>Pepper Drive/Bostonia CPA merged into Lakeside CPA

Sources: Technology Associates International Corporation, SANDAG 2001 GIS Database, and Economics Research Associates.