BOARD OF DIRECTORS
FEBRUARY 26, 2010

AGENDA ITEM NO. 10-02-16
ACTION REQUESTED – ACCEPT

2050 REGIONAL GROWTH FORECAST

File Number 3100900

Recommendation

The Regional Planning Committee recommends that the Board of Directors accept the 2050 Regional Growth Forecast for use in the 2050 Regional Transportation Plan and other planning efforts.

Introduction

During the past 14 months, SANDAG staff and representatives and elected officials from each of the San Diego region's 19 jurisdictions have worked together to develop a long-range growth forecast for the San Diego region and its neighborhoods. The results of that effort are described in detail below.

Discussion

Goals and Purpose of the 2050 Forecast

The purpose of the 2050 Regional Growth Forecast is to provide a starting point for regional planning. The forecast is not intended to be a prescription for future growth. Rather, the forecast is intended to show possible future development patterns, based on regional projections and local input.

The 2050 Regional Growth Forecast is one of the first steps in developing the 2050 Regional Transportation Plan (RTP), and it will inform the development of the region's first Sustainable Communities Strategy (SCS), a new component of the RTP, and the Regional Housing Needs Assessment (RHNA) per California Senate Bill 375 (SB 375) (Chapter 728, Statutes of 2008). In addition, the forecast information will be used to evaluate future applications for the region's Smart Growth Incentive Program and support local capital improvement and water resource planning throughout the region. This forecast complies with all applicable statutes and regulations regarding the RTP, SCS, and RHNA from SB 375 and the California Transportation Commission Draft RTP Guidelines.

The 2050 Regional Growth Forecast is a locally-driven study with input from local jurisdiction staffs and elected officials on future planning and land use assumptions. Based on the direction of the Board of Directors last July, SANDAG staff solicited input on the forecast from each jurisdiction at City Council, Board of Supervisors, and planning commission meetings during the last six months. The information and comments collected during these meetings and subsequent interactions had a significant impact on formulating the region's most likely development pattern over the next 40 years.

In addition to working with local jurisdictions, SANDAG staff worked closely with local resource agencies and service providers to incorporate any resource supply information into the forecast as well.

Forecast Process

The 2050 Regional Growth Forecast is developed through a multi-step, collaborative process involving input and review by a wide range of local, regional, and subject-area experts.

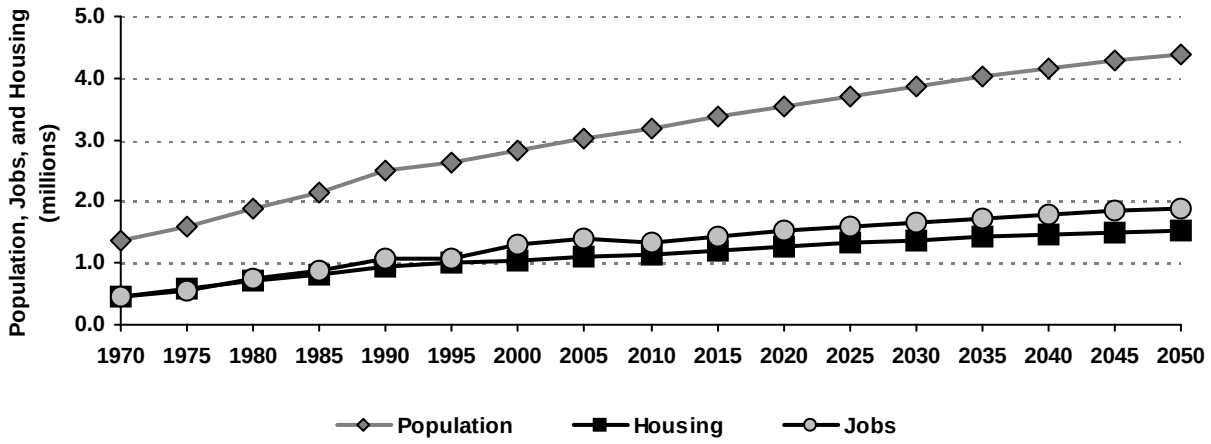
The first step in the forecast process is to develop a regionwide growth projection of population, jobs, housing, and other demographic and economic characteristics. The regionwide projections are developed using the Demographic and Economic Forecasting Model (DEFM), which has had a 30-year track record of accurate regionwide projections. The DEFM input, assumptions, and results were reviewed twice by a panel of subject-area experts, including representatives from local universities, economic and workforce development agencies, resource providers, public-sector partners, and key industries. The panel represented areas of expertise ranging from economic and demographic trends to housing and resource issues.

The regionwide projections then become one input into the subregional, or neighborhood-level, forecast. The second key component of the subregional forecast is local land use data, developed through extensive collaboration with each of the 18 cities and the County of San Diego, as well as other land use agencies such as the tribal governments and Department of Defense. The local land use inputs incorporate such information as existing development, general plans, constraints to development (e.g., floodplains, steep slopes, habitat preserves, historic districts, building height restrictions, and zoning), and permitted projects in the development pipeline. The final building blocks of the subregional forecast are proximity to existing job centers (along with travel time and commute choice information), and historical development patterns. These four key inputs influence the probability of a neighborhood's future growth. The results of this model were then reviewed by each jurisdiction's staff, and the final forecast was adjusted based on local feedback.

2050: Regional Growth

Economic and population growth will continue at a steady rate through 2050, although at a slightly slower rate than in the previous 40 years. The current recession has been deep and protracted. As a result, SANDAG staff updated the regionwide projections to reflect current market conditions. These updated projections suggest that the region will approach 4.4 million residents, 1.9 million jobs, and 1.5 million housing units by 2050. (See Figure 1.)

Figure 1: 2050 Regional Population, Jobs, and Housing Forecast



While this forecast is being completed during an economic recession, it is important to remember that during the last 40 years the San Diego region has weathered seven economic downturns, including two protracted recessions during the early 1970s and 1980s. As a result, the San Diego region's economy has transformed from an economy largely focused on defense services during the Cold War to a diversified economy based on biotechnology, healthcare, tourism, education, and defense services. During the same time period, the region revived trolley service; built State Routes 15, 52, and 56; and opened the Otay Mesa Land Port of Entry, which handles more than $31 billion of goods annually. Growth between today and 2050 is likely to encompass a similar magnitude of change and challenges.

One of the recurring concerns expressed by local jurisdictions and elected leaders relates to future water availability. Throughout the forecast process, SANDAG staff worked closely with staff from the San Diego County Water Authority. The 2050 Regional Growth Forecast will provide a key input to the 2010 Urban Water Management Plan. During the development of both the Urban Water Management Plan and the RTP, SANDAG staff will continue to work with the County Water Authority staff to ensure that the region's resource needs are addressed.

Meeting the Region's Projected Need for Housing

Senate Bill 375 requires that the SCS identify areas within the region sufficient to house all the population of the region for the planning period of the RTP. The 2050 Regional Growth Forecast achieves that goal and balances it with a reasonable expectation of future growth and commuting patterns in and around the San Diego region.

Since July 2009, the region's jurisdictions each made a concerted effort to review how their local plans, policies, and redevelopment potential might change between 2035 and 2050. Through that effort the region identified sufficient residential capacity to house the region's projected population growth out to 2050. This additional capacity was derived from input from the local jurisdictions and our partner agencies. Local land use inputs for this time period included draft plan updates, rezoning, future redevelopment (based on existing plans), mixed-use development at transit stations, and redevelopment within Smart Growth Opportunity Areas.

The 2020 projections from the 2050 Regional Growth Forecast will be one of the inputs into the next RHNA allocation process; the alternative land uses proposed by jurisdictions to help meet the region's housing needs from 2035-2050 will not be included in or affect the RHNA allocation process. A RHNA methodology will be discussed and determined by the Board of Directors, with input from the Regional Planning Committee, Regional Planning Technical Working Group, and Regional Housing Working Group later this year.

Interregional Commuting

Today, thousands of Southern California and Northern Baja California residents commute to and from the San Diego region for work, school, shopping, and recreation. People choose to live outside the San Diego region but work and recreate in the region for a number of reasons. Therefore, it is unrealistic to assume interregional commuting will be zero in the future. SANDAG staff and staff from the California Air Resources Board (CARB) discussed and agreed upon this approach in a meeting on December 3, 2009.

Since interregional commuting occurs, SANDAG developed a model in 2001 for use in regional forecasting, known as the Interregional Commute Model (IRCM), to predict future levels of

interregional commuting based on job availability, travel time, home prices, and future housing availability. Using this model, analysis shows that with sufficient residential capacity within the San Diego region, it still is likely that an additional 15,000 households will still choose to reside in Orange, Riverside, or Imperial Counties, or in Northern Baja California, and commute into the San Diego region for work over the course of the forecasted period.

Results

Based on all of the land use inputs received from local jurisdictions, and predictions of likely development patterns in the future, the region can expect approximately 50 percent of future job and housing growth likely to occur in Smart Growth Opportunity Areas. (Attachment 1 shows the current Smart Growth Concept Map.) In addition, this forecast projects that more than 70 percent of future job and housing growth will likely occur within the Transit Investment Area, defined as being the area with highest priority for future transit investments.

Maps of the growth projections showing historic, current, and future job and housing density are shown in Attachment 2. The results of this growth forecast for the region are shown in Attachment 3, and projections by jurisdiction are shown in Attachment 4.

Next Steps

Upon acceptance by the SANDAG Board of Directors at its February 26 meeting, the 2050 Regional Growth Forecast will be used to begin developing the 2050 RTP. The final forecast would be brought to the Board of Directors for action in 2011, concurrent with the 2050 RTP.

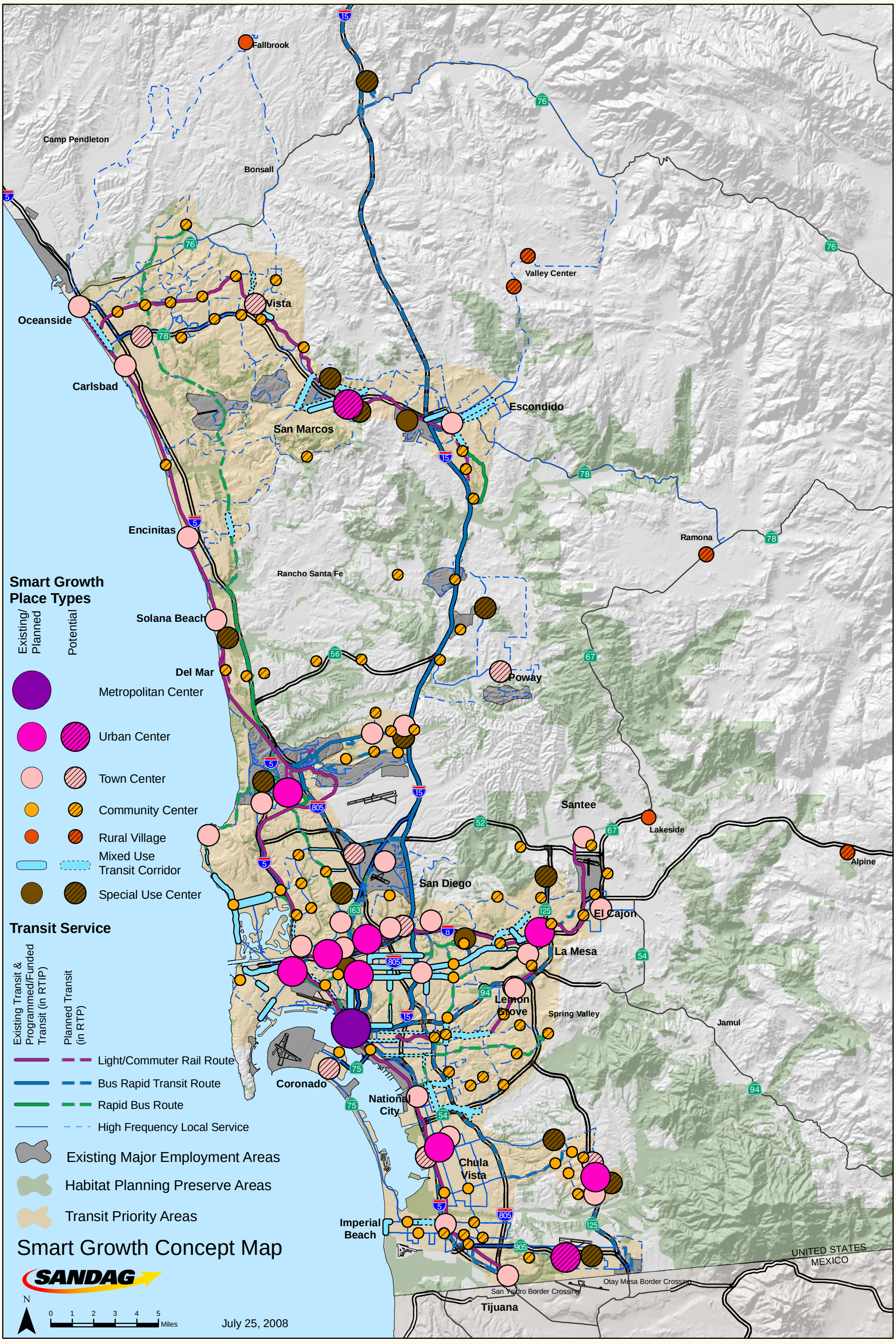
GARY L. GALLEGOS
Executive Director

Attachments:
1. San Diego Regional Comprehensive Plan Smart Growth Concept Map
2a. Employment Density 1995 – Jobs/Acre
2b. Employment Density 2008 – Jobs/Acre
2c. Employment Density 2050 – Jobs/Acre
2d. Housing Density 1995 – Dwelling Units/Acre
2e. Housing Density 2008 – Dwelling Units/Acre
2f. Housing Density 2050 – Dwelling Units/Acre
3. 2050 Regionwide Growth Forecast
4. 2050 Subregional Growth Forecast

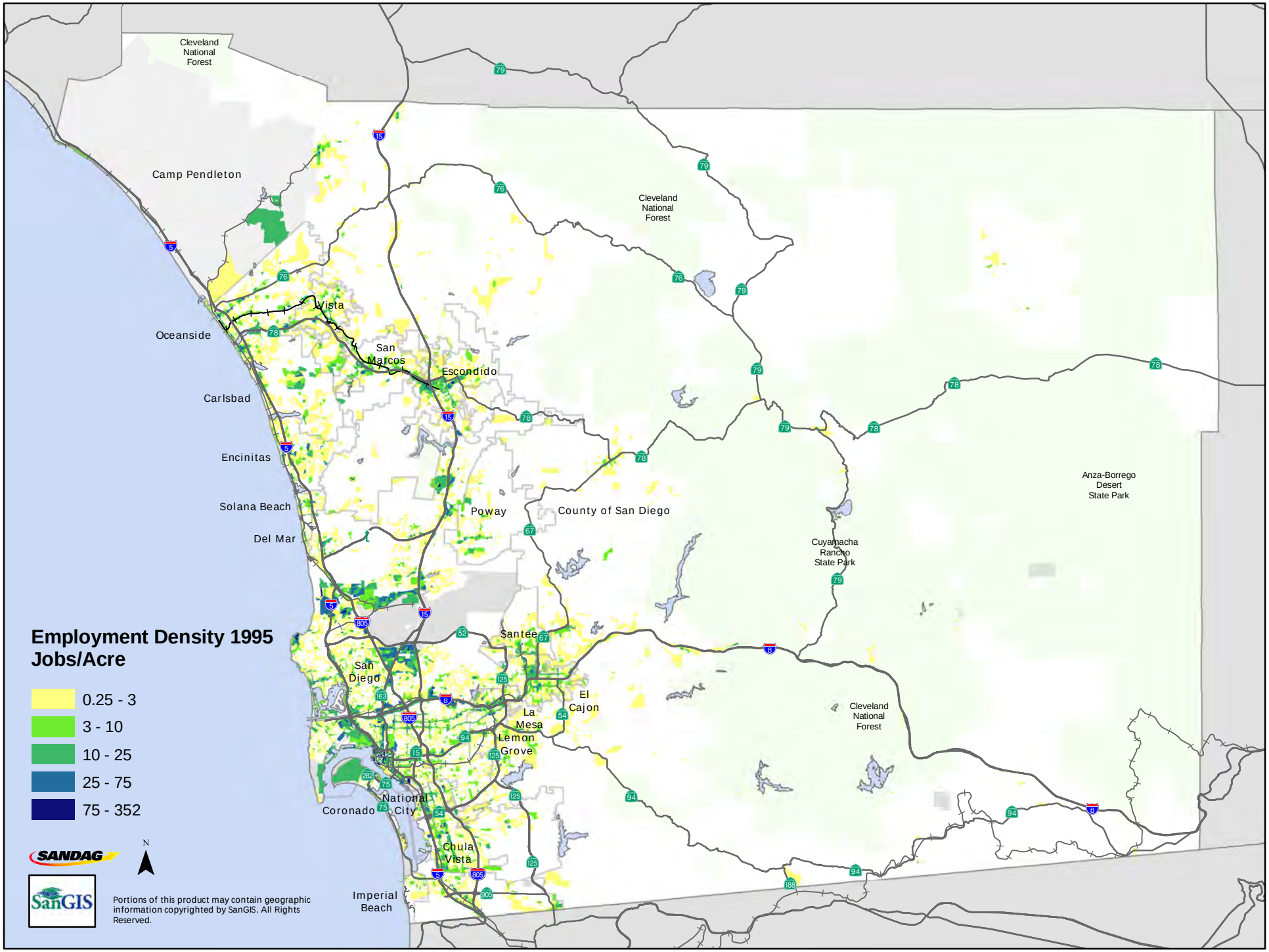
Key Staff Contact: Beth Jarosz, (619) 699-6997, bja@sandag.org

San Diego Regional Comprehensive Plan (RCP)
Smart Growth Concept Map

Attachment 1



All Smart Growth Opportunity Areas shown on the map have been identified and recommended for inclusion on the map by local jurisdictions.


Employment Density 1995
Jobs/Acre
0.25 - 3
3 - 10
10 - 25
25 - 75
75 - 352
Cleveland National Forest
Camp Pendleton
Oceanside
Vista
San Marcos
Escondido
Carlsbad
Encinitas
Solana Beach
Del Mar
Poway
County of San Diego
Cuyamaca Rancho State Park
Anza-Borrego Desert State Park
Santee
San Diego
El Cajon
La Mesa
Lemon Grove
National City
Coronado
Chula Vista
Imperial Beach
N
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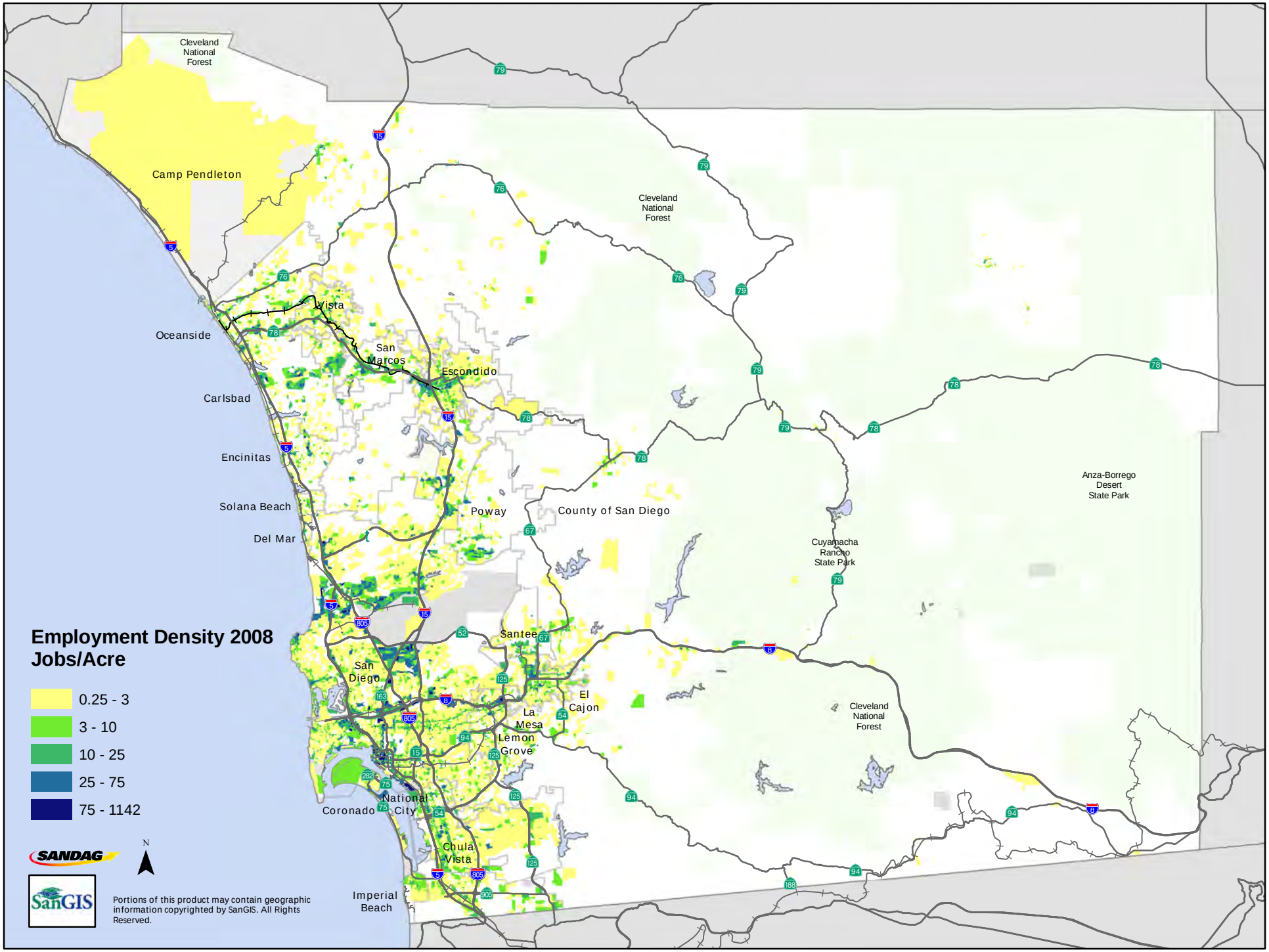
Employment Density 2008
Jobs/Acre
0.25 - 3
3 - 10
10 - 25
25 - 75
75 - 1142
Cleveland National Forest
Camp Pendleton
Oceanside
Vista
San Marcos
Escondido
Carlsbad
Encinitas
Solana Beach
Del Mar
Poway
County of San Diego
Cuyamaca Rancho State Park
Anza-Borrego Desert State Park
Santee
San Diego
El Cajon
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National City
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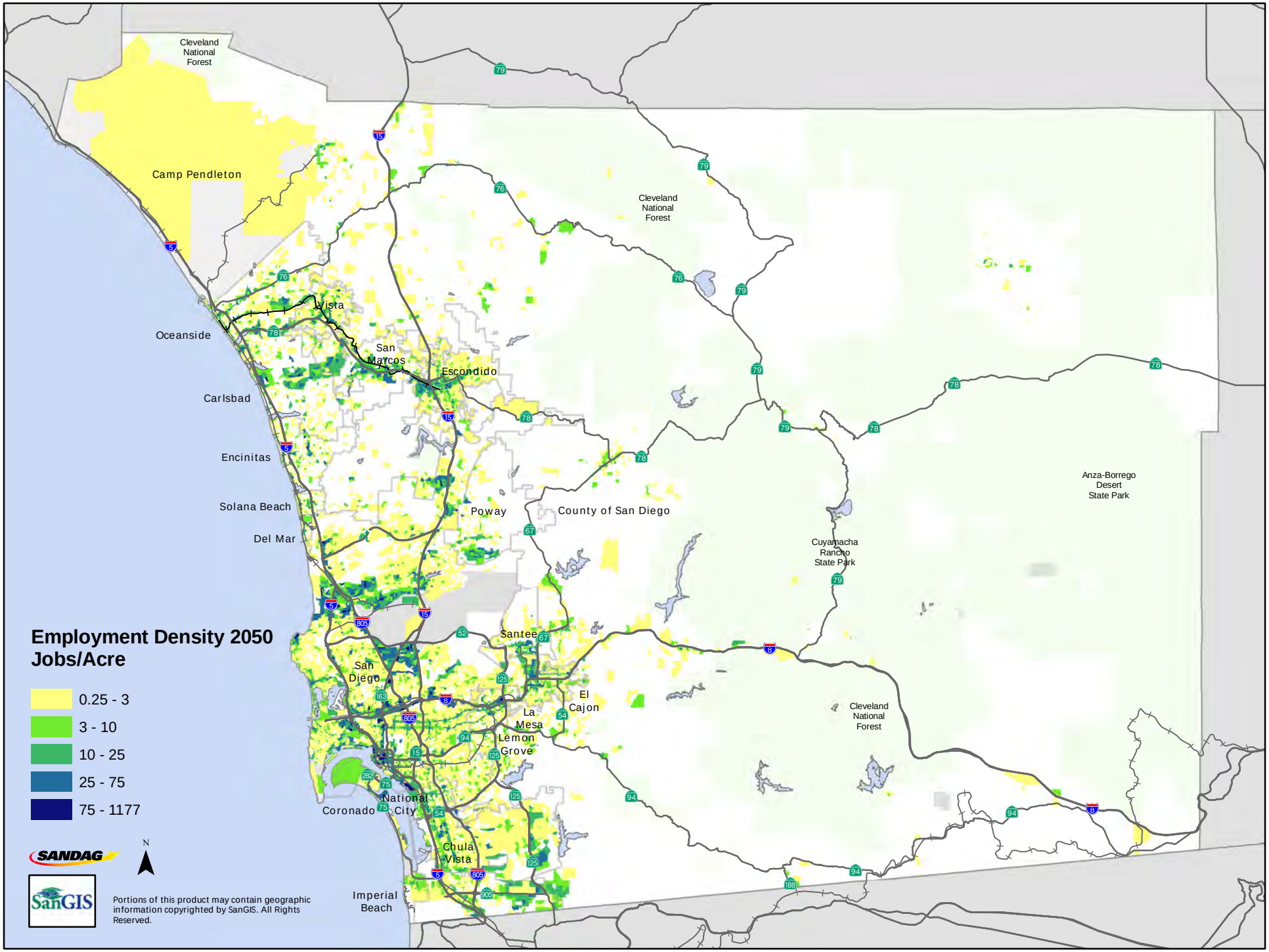
Employment Density 2050
Jobs/Acre
0.25 - 3
3 - 10
10 - 25
25 - 75
75 - 1177
Cleveland National Forest
Camp Pendleton
Oceanside
Vista
San Marcos
Escondido
Carlsbad
Encinitas
Solana Beach
Del Mar
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County of San Diego
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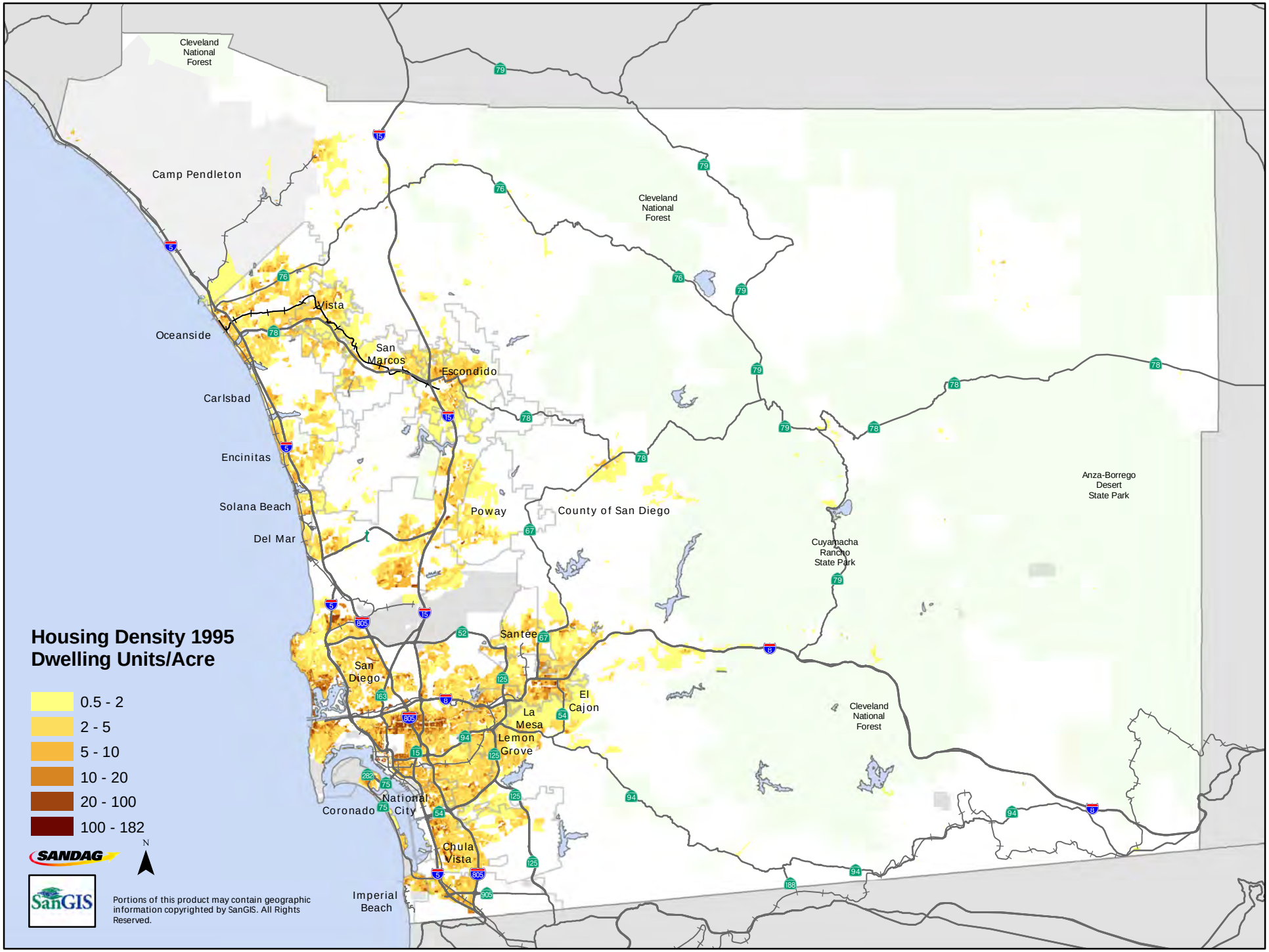
Housing Density 1995
Dwelling Units/Acre
0.5 - 2
2 - 5
5 - 10
10 - 20
20 - 100
100 - 182
N
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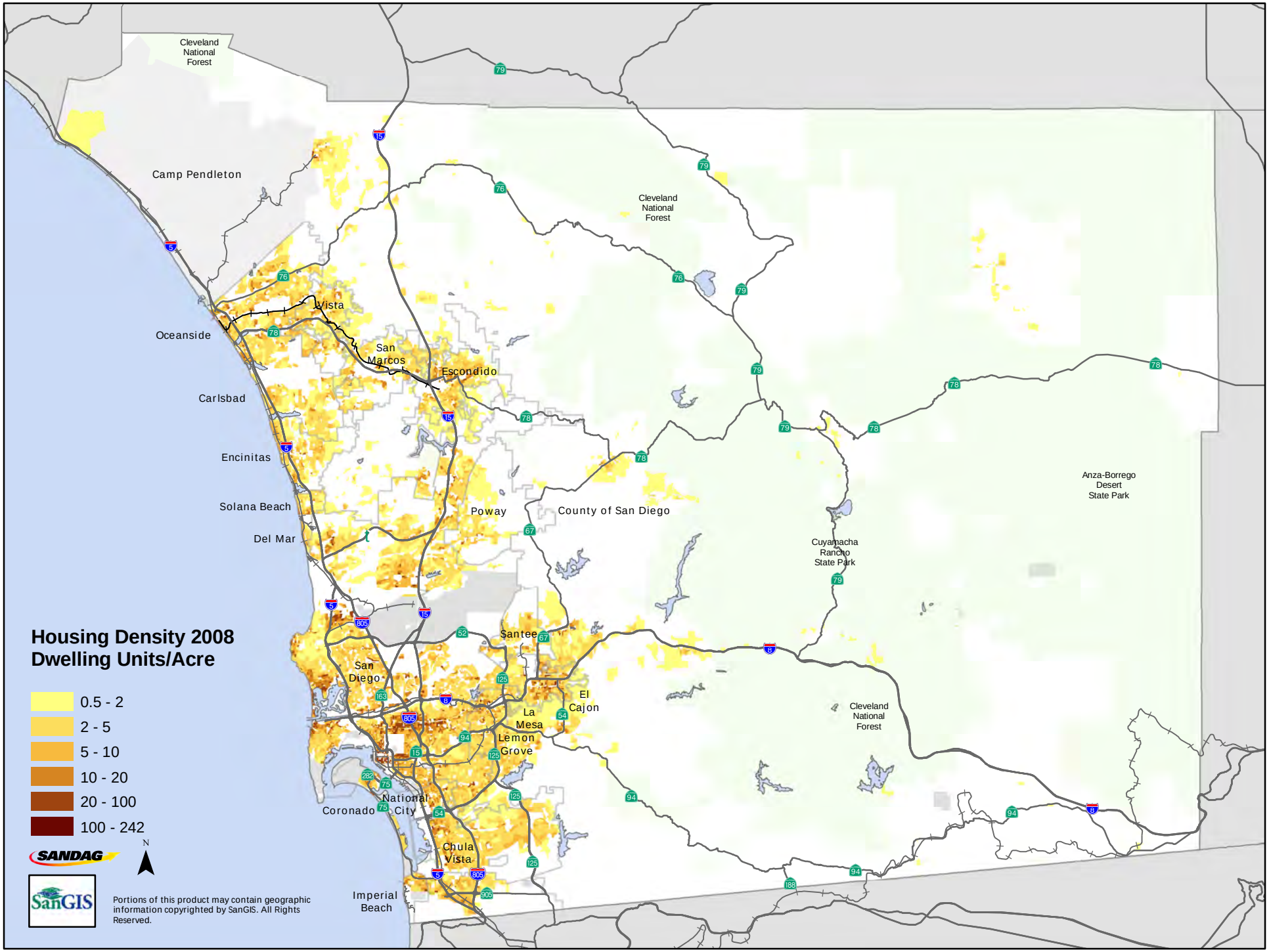
Housing Density 2008
Dwelling Units/Acre
0.5 - 2
2 - 5
5 - 10
10 - 20
20 - 100
100 - 242
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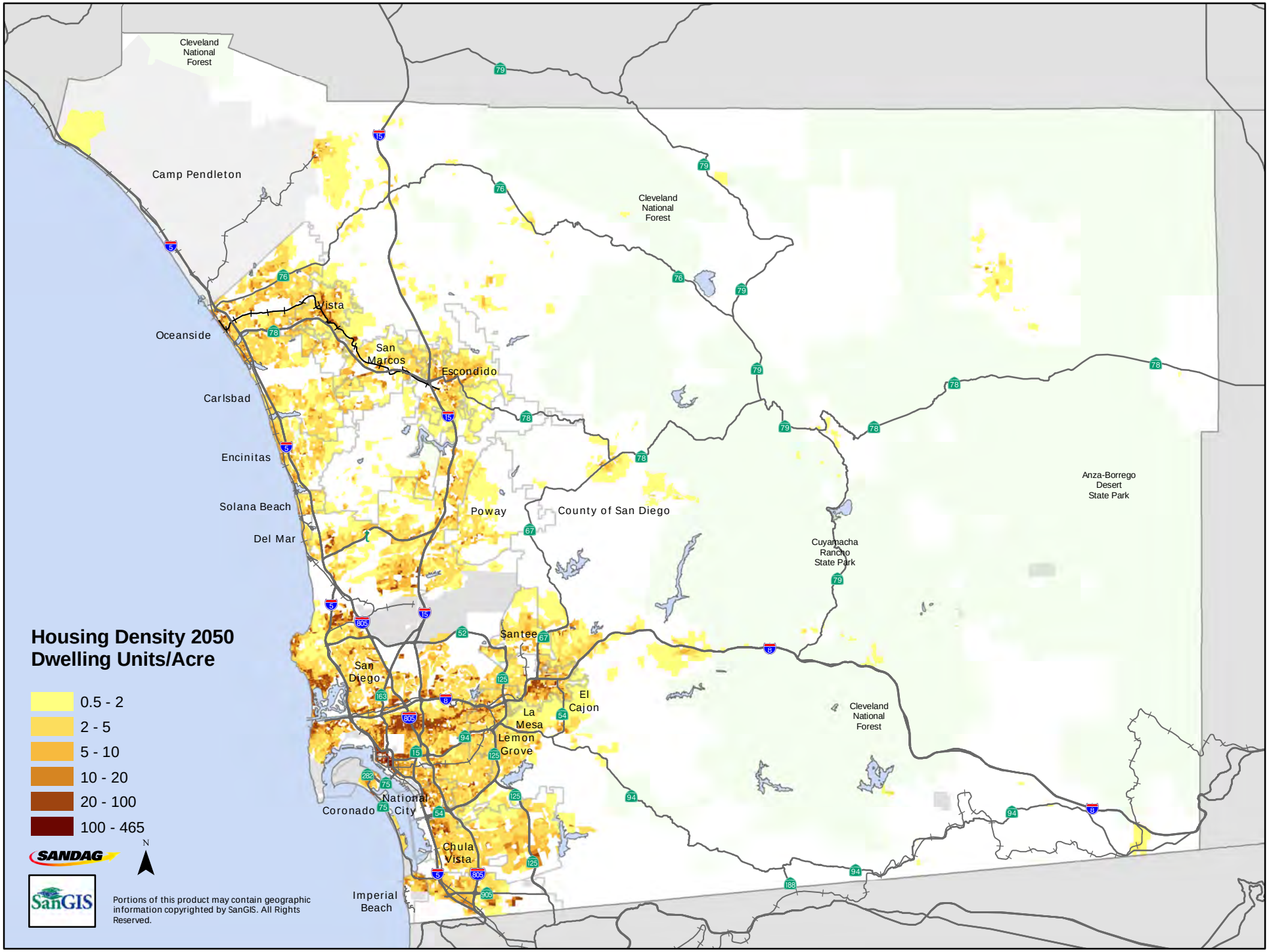
Housing Density 2050
Dwelling Units/Acre
0.5 - 2
2 - 5
5 - 10
10 - 20
20 - 100
100 - 465
N
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Chula Vista
Imperial Beach

2050 Regionwide Projections

Regional Projections

	2008	2030	2050	Change 2008-2050 Number	Pct.
Population	3,131,552	3,870,001	4,384,867	1,253,315	40%
Household Population	3,033,985	3,725,900	4,210,591	1,176,606	39%
Group Quarters	97,567	144,101	174,276	76,709	79%
Jobs	1,501,080	1,752,630	2,003,038	501,958	33%
Civilian	1,411,811	1,648,361	1,898,769	486,958	34%
Military	89,269	104,269	104,269	15,000	17%
Housing	1,140,654	1,369,797	1,529,090	388,436	34%
Single-family	692,382	750,022	761,699	69,317	10%
Multi-family	405,023	581,143	732,832	327,809	81%
Mobile home	43,249	38,632	34,559	-8,690	-20%
Households	1,074,896	1,309,471	1,467,027	392,131	36%
Vacancy	5.8%	4.4%	4.1%	-0.02	-30%
Household Size	2.82	2.85	2.87	0.05	2%
Acres	2,727,197	2,727,197	2,727,197	0	0%
Residential	335,944	492,004	631,251	295,307	88%
Employment	88,162	92,557	97,477	9,315	11%
Parks and Constrained Land	1,539,860	1,540,996	1,541,458	1,598	0%
Vacant Land	385,917	255,024	138,396	-247,521	-64%
Other	763,232	601,640	457,011	-306,220	-40%
Housing Density (net)	3.4	2.8	2.4	-1.0	-29%
Job Density (net, civilian)	16.0	17.8	19.5	3.5	22%

Note: Other acreage includes water, road right-of-way, agriculture, military use, etc…

Distribution of Projected Housing Growth

	2008	2030	2050	Change 2008-2050 Number	Pct.	Pct. of Change 2008-50
Region	1,140,654	1,369,797	1,529,090	388,436	34%	100%
Transit Investment Areas	783,489	945,582	1,074,556	291,067	37%	75%
Smart Growth Opportunity Areas	215,275	324,894	423,211	207,936	97%	54%
Near Transit*	517,909	625,364	734,460	216,551	42%	56%

**Near Transit: Within a 10-minute walk of existing high-frequency transit station(s).*

Distribution of Projected Job Growth

	2008	2030	2050	Change 2008-2050 Number	Pct.	Pct. of Change 2008-50
Region	1,501,080	1,752,630	2,003,038	501,958	33%	100%
Transit Investment Areas	1,147,804	1,319,764	1,492,793	344,989	30%	69%
Smart Growth Opportunity Areas	505,874	592,335	685,028	179,154	35%	36%
Near Transit*	783,270	886,927	993,774	210,504	27%	42%

**Near Transit: Within a 10-minute walk of existing high-frequency transit station(s).*

Disclaimer: This forecast represents one possibility for future growth in the San Diego region. It is intended to represent a likely prediction of future growth, but it is not intended to be a prescription for growth. The 2050 Regional Growth Forecast represents a combination of economic and demographic projections, existing land use plans and policies, as well as potential land use plan changes that may occur in the region between 2030 and 2050. In general, growth between 2008 and 2030 is based on adopted land use plans and policies, and growth between 2030 and 2050 includes alternatives that may, in some cases, reach beyond existing adopted plans, based on input received from individual jurisdictions.

2050 Subregional Growth Forecast

Disclaimer: This forecast represents one possibility for future growth in the San Diego region. It is intended to represent a likely prediction of future growth, but it is not intended to be a prescription for growth. The 2050 Regional Growth Forecast represents a combination of economic and demographic projections, existing land use plans and policies, as well as potential land use plan changes that may occur in the region between 2030 and 2050. In general, growth between 2008 and 2030 is based on adopted land use plans and policies, and growth between 2030 and 2050 includes alternatives that may, in some cases, reach beyond existing adopted plans.

POPULATION

		Actual	Projections			Numeric Change by Increment			Change 2008-2050		
		2008	2020	2035	2050	2008-20	2020-35	2035-50	Total	Percent	Avg Ann
1	Carlsbad	103,406	117,657	125,293	129,381	14,251	7,636	4,088	25,975	25.1%	0.5%
2	Chula Vista	230,397	267,427	301,324	330,381	37,030	33,897	29,057	99,984	43.4%	0.9%
3	Coronado	23,030	26,348	27,210	27,937	3,318	862	727	4,907	21.3%	0.5%
4	Del Mar	4,561	4,799	4,977	5,148	238	178	171	587	12.9%	0.3%
5	El Cajon	97,555	109,623	138,506	144,515	12,068	28,883	6,009	46,960	48.1%	0.9%
6	Encinitas	63,615	68,594	74,218	76,659	4,979	5,624	2,441	13,044	20.5%	0.4%
7	Escondido	143,259	154,329	168,141	177,586	11,070	13,812	9,445	34,327	24.0%	0.5%
8	Imperial Beach	28,092	28,230	31,832	36,198	138	3,602	4,366	8,106	28.9%	0.6%
9	La Mesa	56,445	62,100	68,481	77,780	5,655	6,381	9,299	21,335	37.8%	0.8%
10	Lemon Grove	25,511	26,688	29,874	32,144	1,177	3,186	2,270	6,633	26.0%	0.6%
11	National City	56,144	62,300	74,364	90,070	6,156	12,064	15,706	33,926	60.4%	1.1%
12	Oceanside	178,102	195,455	212,213	217,364	17,353	16,758	5,151	39,262	22.0%	0.5%
13	Poway	50,744	54,070	58,458	59,808	3,326	4,388	1,350	9,064	17.9%	0.4%
14	San Diego	1,333,617	1,542,528	1,756,621	1,945,569	208,911	214,093	188,948	611,952	45.9%	0.9%
15	San Marcos	82,419	90,802	103,110	105,708	8,383	12,308	2,598	23,289	28.3%	0.6%
16	Santee	55,850	64,517	72,736	73,677	8,667	8,219	941	17,827	31.9%	0.7%
17	Solana Beach	13,447	14,227	15,194	15,942	780	967	748	2,495	18.6%	0.4%
18	Vista	95,400	100,016	117,471	144,536	4,616	17,455	27,065	49,136	51.5%	1.0%
19	Unincorporated	489,958	545,290	646,108	694,464	55,332	100,818	48,356	204,506	41.7%	0.8%
	Region Total	3,131,552	3,535,000	4,026,131	4,384,867	403,448	491,131	358,736	1,253,315	40.0%	0.8%

HOUSEHOLD POPULATION

		Actual	Projections			Numeric Change by Increment			Change 2008-2050		
		2008	2020	2035	2050	2008-20	2020-35	2035-50	Total	Percent	Avg Ann
1	Carlsbad	102,741	116,913	124,247	128,065	14,172	7,334	3,818	25,324	24.6%	0.5%
2	Chula Vista	228,958	265,713	298,783	327,035	36,755	33,070	28,252	98,077	42.8%	0.9%
3	Coronado	18,108	18,554	19,362	20,033	446	808	671	1,925	10.6%	0.2%
4	Del Mar	4,559	4,792	4,953	5,114	233	161	161	555	12.2%	0.3%
5	El Cajon	94,982	106,672	134,429	139,414	11,690	27,757	4,985	44,432	46.8%	0.9%
6	Encinitas	63,056	67,848	72,979	74,945	4,792	5,131	1,966	11,889	18.9%	0.4%
7	Escondido	141,059	151,544	163,586	171,406	10,485	12,042	7,820	30,347	21.5%	0.5%
8	Imperial Beach	27,426	27,903	31,489	35,843	477	3,586	4,354	8,417	30.7%	0.6%
9	La Mesa	55,399	60,637	66,499	75,329	5,238	5,862	8,830	19,930	36.0%	0.7%
10	Lemon Grove	24,920	26,014	28,934	30,935	1,094	2,920	2,001	6,015	24.1%	0.5%
11	National City	52,833	57,940	69,558	84,908	5,107	11,618	15,350	32,075	60.7%	1.1%
12	Oceanside	176,822	193,630	208,738	212,399	16,808	15,108	3,661	35,577	20.1%	0.4%
13	Poway	50,318	53,518	57,572	58,600	3,200	4,054	1,028	8,282	16.5%	0.4%
14	San Diego	1,293,623	1,487,652	1,692,380	1,872,555	194,029	204,728	180,175	578,932	44.8%	0.9%
15	San Marcos	81,730	90,059	102,187	104,614	8,329	12,128	2,427	22,884	28.0%	0.6%
16	Santee	54,807	63,418	71,417	72,192	8,611	7,999	775	17,385	31.7%	0.7%
17	Solana Beach	13,413	14,154	15,030	15,670	741	876	640	2,257	16.8%	0.4%
18	Vista	93,134	97,368	113,774	139,899	4,234	16,406	26,125	46,765	50.2%	1.0%
19	Unincorporated	456,097	500,739	597,258	641,635	44,642	96,519	44,377	185,538	40.7%	0.8%
	Region Total	3,033,985	3,405,068	3,873,175	4,210,591	371,083	468,107	337,416	1,176,606	38.8%	0.8%

GROUP QUARTERS POPULATION

		Actual	Projections			Numeric Change by Increment			Change 2008-2050		
		2008	2020	2035	2050	2008-20	2020-35	2035-50	Total	Percent	Avg Ann
1	Carlsbad	665	744	1,046	1,316	79	302	270	651	97.9%	1.6%
2	Chula Vista	1,439	1,714	2,541	3,346	275	827	805	1,907	132.5%	2.0%
3	Coronado	4,922	7,794	7,848	7,904	2,872	54	56	2,982	60.6%	1.1%
4	Del Mar	2	7	24	34	5	17	10	32	1600.0%	7.0%
5	El Cajon	2,573	2,951	4,077	5,101	378	1,126	1,024	2,528	98.3%	1.6%
6	Encinitas	559	746	1,239	1,714	187	493	475	1,155	206.6%	2.7%
7	Escondido	2,200	2,785	4,555	6,180	585	1,770	1,625	3,980	180.9%	2.5%
8	Imperial Beach	666	327	343	355	-339	16	12	-311	-46.7%	-1.5%
9	La Mesa	1,046	1,463	1,982	2,451	417	519	469	1,405	134.3%	2.0%
10	Lemon Grove	591	674	940	1,209	83	266	269	618	104.6%	1.7%
11	National City	3,311	4,360	4,806	5,162	1,049	446	356	1,851	55.9%	1.1%
12	Oceanside	1,280	1,825	3,475	4,965	545	1,650	1,490	3,685	287.9%	3.3%
13	Poway	426	552	886	1,208	126	334	322	782	183.6%	2.5%
14	San Diego	39,994	54,876	64,241	73,014	14,882	9,365	8,773	33,020	82.6%	1.4%
15	San Marcos	689	743	923	1,094	54	180	171	405	58.8%	1.1%
16	Santee	1,043	1,099	1,319	1,485	56	220	166	442	42.4%	0.8%
17	Solana Beach	34	73	164	272	39	91	108	238	700.0%	5.1%
18	Vista	2,266	2,648	3,697	4,637	382	1,049	940	2,371	104.6%	1.7%
19	Unincorporated	33,861	44,551	48,850	52,829	10,690	4,299	3,979	18,968	56.0%	1.1%
	Region Total	97,567	129,932	152,956	174,276	32,365	23,024	21,320	76,709	78.6%	1.4%

2050 Subregional Growth Forecast

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HOUSING

		Actual	Draft Projections			Numeric Change by Increment			Change 2008-2050		
		2008	2020	2035	2050	2008-20	2020-35	2035-50	Total	Percent	Avg Ann
1	Carlsbad	43,496	48,100	50,208	50,566	4,604	2,108	358	7,070	16.3%	0.4%
2	Chula Vista	77,484	88,185	98,511	107,011	10,701	10,326	8,500	29,527	38.1%	0.8%
3	Coronado	9,543	9,568	9,758	9,801	25	190	43	258	2.7%	0.1%
4	Del Mar	2,535	2,586	2,606	2,606	51	20	0	71	2.8%	0.1%
5	El Cajon	35,596	39,186	48,135	49,861	3,590	8,949	1,726	14,265	40.1%	0.8%
6	Encinitas	24,805	26,328	28,126	28,486	1,523	1,798	360	3,681	14.8%	0.3%
7	Escondido	47,392	50,287	53,081	54,600	2,895	2,794	1,519	7,208	15.2%	0.3%
8	Imperial Beach	9,851	9,866	10,850	12,170	15	984	1,320	2,319	23.5%	0.5%
9	La Mesa	25,019	26,785	28,936	32,459	1,766	2,151	3,523	7,440	29.7%	0.6%
10	Lemon Grove	8,820	9,075	9,851	10,517	255	776	666	1,697	19.2%	0.4%
11	National City	15,773	17,117	20,226	24,663	1,344	3,109	4,437	8,890	56.4%	1.1%
12	Oceanside	64,456	69,565	73,599	73,600	5,109	4,034	1	9,144	14.2%	0.3%
13	Poway	16,313	17,231	18,214	18,216	918	983	2	1,903	11.7%	0.3%
14	San Diego	508,436	577,557	653,946	722,280	69,121	76,389	68,334	213,844	42.1%	0.8%
15	San Marcos	27,556	30,068	33,421	33,596	2,512	3,353	175	6,040	21.9%	0.5%
16	Santee	19,538	22,306	24,574	24,834	2,768	2,268	260	5,296	27.1%	0.6%
17	Solana Beach	6,509	6,645	6,932	7,041	136	287	109	532	8.2%	0.2%
18	Vista	30,650	31,602	36,061	43,893	952	4,459	7,832	13,243	43.2%	0.9%
19	Unincorporated	166,882	180,431	210,485	222,890	13,549	30,054	12,405	56,008	33.6%	0.7%
	Region Total	1,140,654	1,262,488	1,417,520	1,529,090	121,834	155,032	111,570	388,436	34.1%	0.7%

HOUSEHOLDS (OCCUPIED UNITS)

		Actual	Projections			Numeric Change by Increment			Change 2008-2050		
		2008	2020	2035	2050	2008-20	2020-35	2035-50	Total	Percent	Avg Ann
1	Carlsbad	40,028	45,024	47,389	47,884	4,996	2,365	495	7,856	19.6%	0.4%
2	Chula Vista	73,385	84,499	95,150	103,650	11,114	10,651	8,500	30,265	41.2%	0.8%
3	Coronado	7,753	7,877	8,114	8,215	124	237	101	462	6.0%	0.1%
4	Del Mar	2,148	2,218	2,266	2,285	70	48	19	137	6.4%	0.1%
5	El Cajon	33,970	37,685	46,551	48,309	3,715	8,866	1,758	14,339	42.2%	0.8%
6	Encinitas	23,638	25,296	27,112	27,526	1,658	1,816	414	3,888	16.4%	0.4%
7	Escondido	45,513	48,609	51,520	53,087	3,096	2,911	1,567	7,574	16.6%	0.4%
8	Imperial Beach	9,326	9,425	10,434	11,731	99	1,009	1,297	2,405	25.8%	0.5%
9	La Mesa	24,039	25,908	28,103	31,565	1,869	2,195	3,462	7,526	31.3%	0.7%
10	Lemon Grove	8,411	8,728	9,524	10,191	317	796	667	1,780	21.2%	0.5%
11	National City	15,020	16,409	19,530	23,887	1,389	3,121	4,357	8,867	59.0%	1.1%
12	Oceanside	60,153	65,490	69,529	69,746	5,337	4,039	217	9,593	15.9%	0.4%
13	Poway	15,910	16,879	17,888	17,912	969	1,009	24	2,002	12.6%	0.3%
14	San Diego	479,164	549,849	626,202	692,895	70,685	76,353	66,693	213,731	44.6%	0.9%
15	San Marcos	26,547	29,122	32,497	32,719	2,575	3,375	222	6,172	23.2%	0.5%
16	Santee	19,080	21,864	24,145	24,425	2,784	2,281	280	5,345	28.0%	0.6%
17	Solana Beach	5,760	5,995	6,294	6,420	235	299	126	660	11.5%	0.3%
18	Vista	29,040	30,232	34,695	42,320	1,192	4,463	7,625	13,280	45.7%	0.9%
19	Unincorporated	156,011	169,857	200,141	212,259	13,846	30,284	12,118	56,248	36.1%	0.7%
	Region Total	1,074,896	1,200,966	1,357,084	1,467,026	126,070	156,118	109,942	392,130	36.5%	0.7%

VACANCY RATE

		Actual	Projections			Numeric Change by Increment			Change 2008-2050		
		2008	2020	2035	2050	2008-20	2020-35	2035-50	Total	Percent	Avg Ann
1	Carlsbad	8.0%	6.4%	5.6%	5.3%	-0.02	-0.01	0.00	-0.03	-33.5%	-1.0%
2	Chula Vista	5.3%	4.2%	3.4%	3.1%	-0.01	-0.01	0.00	-0.02	-40.6%	-1.2%
3	Coronado	18.8%	17.7%	16.8%	16.2%	-0.01	-0.01	-0.01	-0.03	-13.7%	-0.4%
4	Del Mar	15.3%	14.2%	13.0%	12.3%	-0.01	-0.01	-0.01	-0.03	-19.3%	-0.5%
5	El Cajon	4.6%	3.8%	3.3%	3.1%	-0.01	-0.01	0.00	-0.01	-31.9%	-0.9%
6	Encinitas	4.7%	3.9%	3.6%	3.4%	-0.01	0.00	0.00	-0.01	-28.4%	-0.8%
7	Escondido	4.0%	3.3%	2.9%	2.8%	-0.01	0.00	0.00	-0.01	-30.1%	-0.8%
8	Imperial Beach	5.3%	4.5%	3.8%	3.6%	-0.01	-0.01	0.00	-0.02	-32.3%	-0.9%
9	La Mesa	3.9%	3.3%	2.9%	2.8%	-0.01	0.00	0.00	-0.01	-29.7%	-0.8%
10	Lemon Grove	4.6%	3.8%	3.3%	3.1%	-0.01	-0.01	0.00	-0.02	-33.2%	-1.0%
11	National City	4.8%	4.1%	3.4%	3.1%	-0.01	-0.01	0.00	-0.02	-34.1%	-1.0%
12	Oceanside	6.7%	5.9%	5.5%	5.2%	-0.01	0.00	0.00	-0.01	-21.6%	-0.6%
13	Poway	2.5%	2.0%	1.8%	1.7%	0.00	0.00	0.00	-0.01	-32.4%	-0.9%
14	San Diego	5.8%	4.8%	4.2%	4.1%	-0.01	-0.01	0.00	-0.02	-29.3%	-0.8%
15	San Marcos	3.7%	3.1%	2.8%	2.6%	-0.01	0.00	0.00	-0.01	-28.7%	-0.8%
16	Santee	2.3%	2.0%	1.7%	1.6%	0.00	0.00	0.00	-0.01	-29.7%	-0.8%
17	Solana Beach	11.5%	9.8%	9.2%	8.8%	-0.02	-0.01	0.00	-0.03	-23.4%	-0.6%
18	Vista	5.3%	4.3%	3.8%	3.6%	-0.01	-0.01	0.00	-0.02	-31.8%	-0.9%
19	Unincorporated	6.5%	5.9%	4.9%	4.8%	-0.01	-0.01	0.00	-0.02	-26.8%	-0.7%
	Region Total	5.8%	4.9%	4.3%	4.1%	-0.01	-0.01	0.00	-0.02	-29.6%	-0.8%

2050 Subregional Growth Forecast

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PERSONS PER HOUSEHOLD

		Actual	Projections			Numeric Change by Increment			Change 2008-2050		
		2008	2020	2035	2050	2008-20	2020-35	2035-50	Total	Percent	Avg Ann
1	Carlsbad	2.57	2.60	2.62	2.67	0.03	0.03	0.05	0.11	4.2%	0.1%
2	Chula Vista	3.12	3.14	3.14	3.16	0.02	0.00	0.02	0.04	1.1%	0.0%
3	Coronado	2.34	2.36	2.39	2.44	0.02	0.03	0.05	0.10	4.4%	0.1%
4	Del Mar	2.12	2.16	2.19	2.24	0.04	0.03	0.05	0.12	5.4%	0.1%
5	El Cajon	2.80	2.83	2.89	2.89	0.03	0.06	0.00	0.09	3.2%	0.1%
6	Encinitas	2.67	2.68	2.69	2.72	0.01	0.01	0.03	0.06	2.1%	0.0%
7	Escondido	3.10	3.12	3.18	3.23	0.02	0.06	0.05	0.13	4.2%	0.1%
8	Imperial Beach	2.94	2.96	3.02	3.06	0.02	0.06	0.04	0.11	3.9%	0.1%
9	La Mesa	2.30	2.34	2.37	2.39	0.04	0.03	0.02	0.08	3.6%	0.1%
10	Lemon Grove	2.96	2.98	3.04	3.04	0.02	0.06	0.00	0.07	2.5%	0.1%
11	National City	3.52	3.53	3.56	3.55	0.01	0.03	-0.01	0.04	1.1%	0.0%
12	Oceanside	2.94	2.96	3.00	3.05	0.02	0.05	0.04	0.11	3.6%	0.1%
13	Poway	3.16	3.17	3.22	3.27	0.01	0.05	0.05	0.11	3.4%	0.1%
14	San Diego	2.70	2.71	2.70	2.70	0.01	0.00	0.00	0.00	0.1%	0.0%
15	San Marcos	3.08	3.09	3.14	3.20	0.01	0.05	0.05	0.12	3.9%	0.1%
16	Santee	2.87	2.90	2.96	2.96	0.03	0.06	0.00	0.08	2.9%	0.1%
17	Solana Beach	2.33	2.36	2.39	2.44	0.03	0.03	0.05	0.11	4.8%	0.1%
18	Vista	3.21	3.22	3.28	3.31	0.01	0.06	0.03	0.10	3.1%	0.1%
19	Unincorporated	2.92	2.95	2.98	3.02	0.02	0.04	0.04	0.10	3.4%	0.1%
	Region Total	2.82	2.84	2.85	2.87	0.01	0.02	0.02	0.05	1.7%	0.0%

JOBS

		Actual	Projections			Numeric Change by Increment			Change 2008-2050		
		2008	2020	2035	2050	2008-20	2020-35	2035-50	Total	Percent	Avg Ann
1	Carlsbad	61,999	70,228	80,999	87,100	8,229	10,771	6,101	25,101	40.5%	0.8%
2	Chula Vista	70,230	82,146	106,418	121,555	11,916	24,272	15,137	51,325	73.1%	1.3%
3	Coronado	27,994	28,093	28,226	33,251	99	133	5,025	5,257	18.8%	0.4%
4	Del Mar	4,065	4,149	4,528	5,078	84	379	550	1,013	24.9%	0.5%
5	El Cajon	41,686	44,463	51,861	58,630	2,777	7,398	6,769	16,944	40.6%	0.8%
6	Encinitas	26,985	28,711	30,746	31,481	1,726	2,035	735	4,496	16.7%	0.4%
7	Escondido	61,143	66,803	72,558	75,004	5,660	5,755	2,446	13,861	22.7%	0.5%
8	Imperial Beach	7,543	7,835	8,790	10,240	292	955	1,450	2,697	35.8%	0.7%
9	La Mesa	27,579	28,813	30,968	32,018	1,234	2,155	1,050	4,439	16.1%	0.4%
10	Lemon Grove	7,640	7,890	8,736	9,660	250	846	924	2,020	26.4%	0.6%
11	National City	28,743	29,677	34,668	37,668	934	4,991	3,000	8,925	31.1%	0.6%
12	Oceanside	43,977	48,464	57,710	67,410	4,487	9,246	9,700	23,433	53.3%	1.0%
13	Poway	31,176	32,386	37,280	41,005	1,210	4,894	3,725	9,829	31.5%	0.7%
14	San Diego	821,521	870,106	948,259	1,042,649	48,585	78,153	94,390	221,128	26.9%	0.6%
15	San Marcos	37,383	40,830	51,040	61,585	3,447	10,210	10,545	24,202	64.7%	1.2%
16	Santee	15,304	16,949	20,261	26,554	1,645	3,312	6,293	11,250	73.5%	1.3%
17	Solana Beach	7,533	7,823	8,564	8,780	290	741	216	1,247	16.6%	0.4%
18	Vista	41,315	44,693	53,891	61,293	3,378	9,198	7,402	19,978	48.4%	0.9%
19	Unincorporated	137,264	144,556	162,869	192,077	7,292	18,313	29,208	54,813	39.9%	0.8%
	Region Total	1,501,080	1,604,615	1,798,372	2,003,038	103,535	193,757	204,666	501,958	33.4%	0.7%

JOBS / HOUSING RATIO

		Actual	Projections			Numeric Change by Increment			Change 2008-2050		
		2008	2020	2035	2050	2008-20	2020-35	2035-50	Total	Percent	Avg Ann
1	Carlsbad	1.4	1.5	1.6	1.7	0.0	0.2	0.1	0.3	20.8%	0.5%
2	Chula Vista	0.9	0.9	1.1	1.1	0.0	0.1	0.1	0.2	25.3%	0.5%
3	Coronado	2.9	2.9	2.9	3.4	0.0	0.0	0.5	0.5	15.7%	0.3%
4	Del Mar	1.6	1.6	1.7	1.9	0.0	0.1	0.2	0.3	21.5%	0.5%
5	El Cajon	1.2	1.1	1.1	1.2	0.0	-0.1	0.1	0.0	0.4%	0.0%
6	Encinitas	1.1	1.1	1.1	1.1	0.0	0.0	0.0	0.0	1.6%	0.0%
7	Escondido	1.3	1.3	1.4	1.4	0.0	0.0	0.0	0.1	6.5%	0.1%
8	Imperial Beach	0.8	0.8	0.8	0.8	0.0	0.0	0.0	0.1	9.9%	0.2%
9	La Mesa	1.1	1.1	1.1	1.0	0.0	0.0	-0.1	-0.1	-10.5%	-0.3%
10	Lemon Grove	0.9	0.9	0.9	0.9	0.0	0.0	0.0	0.1	6.0%	0.1%
11	National City	1.8	1.7	1.7	1.5	-0.1	0.0	-0.2	-0.3	-16.2%	-0.4%
12	Oceanside	0.7	0.7	0.8	0.9	0.0	0.1	0.1	0.2	34.2%	0.7%
13	Poway	1.9	1.9	2.0	2.3	0.0	0.2	0.2	0.3	17.8%	0.4%
14	San Diego	1.6	1.5	1.5	1.4	-0.1	-0.1	0.0	-0.2	-10.7%	-0.3%
15	San Marcos	1.4	1.4	1.5	1.8	0.0	0.2	0.3	0.5	35.1%	0.7%
16	Santee	0.8	0.8	0.8	1.1	0.0	0.1	0.2	0.3	36.5%	0.7%
17	Solana Beach	1.2	1.2	1.2	1.2	0.0	0.1	0.0	0.1	7.7%	0.2%
18	Vista	1.3	1.4	1.5	1.4	0.1	0.1	-0.1	0.0	3.6%	0.1%
19	Unincorporated	0.8	0.8	0.8	0.9	0.0	0.0	0.1	0.0	4.8%	0.1%
	Region Total	1.3	1.3	1.3	1.3	0.0	0.0	0.0	0.0	-0.5%	0.0%