



San Diego's Regional Planning Agency



- [ABOUT](#)
- [NEWS](#)
- [NOTICES](#)
- [JOBS](#)
- [RFPs](#)
- [MEETINGS](#)
- [CONTACT](#)

[HELP](#) | [SITE](#)



**News**

**Governor Davis Awards \$1 Million to SANDAG to Develop Regional Plan**

**\$25 Million to Buy More Buses for Interstate 15**

**\$516 Million for Congestion Relief**

**Meetings**

**3/21 Committee on Binational Regional Opportunities (COBRO)**

**3/22 Board of Directors**

**3/29 Walkable Communities Advisory Committee**

**4/4 Integrated Waste Management Technical Advisory Committee (TAC)**

**4/11 Transportation Committee**

**Publications**

**What Works: San Diego County's Breaking Cycles Program [PDF]**

**Regional Transit Vision (RTV) [PDF]**

**Arrests in the San Diego Region, 2000 [PDF]**

# SAN DIEGO Association of Governments *Welcome*

SANDAG serves as the forum for decision-making on regional issues such as growth, transportation, land use, the economy, the environment, and criminal justice. SANDAG is governed by a **Board of Directors** composed of mayors, council members, and supervisors from each of the San Diego region's 19 local governments.


**FEATURED PROJECTS**

➤ **TransNet: Local Tax Dollars for Transportation**  
More than \$3.3 billion in transportation projects is being funded through *TransNet* - the half-percent sales tax that was approved by the region's voters in 1987.



➤ **REGION2020: Creating Livable, Sustainable Communities**  
The REGION2020 strategy has been developed to deal with the region's current sprawl-inducing development patterns, traffic congestion challenges, lack of adequate infrastructure, and the shortage of housing.



➤ **Restoring the Region's Coastline**  
 The Regional Beach Sand Project has restored six miles of our coastline. More shoreline preservation and environmental monitoring efforts are underway.

**Programs**

- [Land Use and Growth](#)
- [Transportation](#)
- [Housing](#)
- [Economics and Environment](#)
- [Binational](#)
- [Criminal Just](#)

**Resource**

- [Demographic Data](#)
- [Maps and GIS Publications](#)

**Services**

- [Public Inform](#)
- [Technical Ass](#)
- [Members](#)
- [SourcePoint](#)

**Email New**

Enter E-mail Address

- [Home](#)
- [Help](#)
- [Site Map](#)
- [Privacy Notice](#)
- [Credits](#)

SANDAG, 401 B Street, Suite 800, San Diego, CA 92101  
 ph: (619) 595-5300, fax: (619) 595-5305, [webmaster@sandag.org](mailto:webmaster@sandag.org)

Having problems viewing PDF files?

S A N D A G

# INFO

SEPTEMBER - OCTOBER 1999, NO. 5 · THREE DOLLARS

## 2020 CITIES/COUNTY FORECAST

*for the San Diego Region*



*Likely Distribution of  
New Housing Units  
Using Current Plans*



*Likely Distribution of  
New Housing Units  
Using Smart Growth*

---

*We are faced with a  
fundamental question  
relating to our quality of  
life: How do we provide  
for growth and yet  
maintain a sustainable and  
prosperous region?*

---

#### **INTRODUCTION**

How is the San Diego region likely to change between now and 2020? Here is some of what we can expect according to the 2020 Regionwide Forecast, released by SANDAG last summer.

- 1 million more people.
- Over 400,000 new homes.
- More than 500,000 added jobs.
- Incomes on the rise.
- Home prices rising faster than incomes.
- An aging and more ethnically diverse population.

Obviously, this scenario presents many opportunities and many challenges. Our local economy is rebounding and restructuring. The old reliance on aerospace and defense is being replaced with increasing numbers of jobs in emerging industries such as software, communications and biotech. As always, however, a growing economy ensures a growing population. We are faced with a fundamental question relating to our quality of life: How do we provide for growth and yet maintain a sustainable and prosperous region? One answer is to have a plan for managing growth that recognizes the interrelationships of issues related to growth.

SANDAG's Regional Growth Management Strategy identifies five basic elements through which all growth-related questions can be addressed. It's a five-part strategy consisting of interrelated, complementary, and equally crucial components, that seeks to:

1. create a sustainable and prosperous economy;
2. provide equitable and accessible transportation;
3. preserve natural habitats and open spaces;
4. provide homes and opportunities for homeownership; and
5. achieve a new state-local tax system.

Each of these elements is important in its own right, and each relates to the others.

In fact, the region has made progress in the first three of these areas. The Regional Economic Prosperity Strategy, adopted by all 19 local jurisdictions in 1998, identifies specific steps toward creating and keeping the well-paying jobs the region needs to raise our standard of living. Most of the major highway projects identified in the current Regional Transportation Plan will be completed by 2005, as will the Mission Valley East Trolley line to La Mesa.

#### **Table of Contents**

Introduction .....	1
Background .....	4
The Capacity Problem .....	4
Smart Growth .....	5
Jurisdiction Forecasts .....	8
Subregional Area (SRA) Forecasts .....	15
Forecast Methodology .....	15

---

Habitat preservation plans are in place that recognize the link between the environment and the economy. When funded and implemented, they will both ensure permanent open space and bring more certainty to the land development process.

Progress on the last two elements will complete the strategy. Providing homes for all San Diegans and raising the region's low rate of home ownership are essential to our well being and sense of community. And, fundamental to all of the other elements is the need to reform the state-local tax system. The current system, which forces local governments to favor retail development over housing, is an impediment to creating sustainable, prosperous communities.

The 2020 Cities/County Forecast discussed in this *INFO* reflects the principles and recommended policies of the Growth Management Strategy. It assumes that land use policies in the region will evolve over time to accommodate the future growth in a logical and sustainable manner. Several documents are being published that discuss the Strategy and its five elements. The reports currently available from SANDAG are: *Living in a Sustainable, Prosperous Region*; *Opening the Road to Opportunity—Future Directions for our Transportation System*; and *Creating Prosperity—San Diego Regional Economic Prosperity Strategy for the San Diego Region*. Future publications will address the preservation of open space and natural habitats; providing homes for San Diegans; and the local taxpayer protection and fiscal stability act.

Profiles showing population, housing, employment, and land use forecasts have been prepared for the region and its jurisdictions, major statistical areas, subregional areas, census tracts, and other planning areas. These profiles, as well as reports describing the forecasting process, are available from SANDAG by calling (619) 595-5300. Many of the profiles and reports also can be accessed from our website at [www.sandag.cog.ca.us](http://www.sandag.cog.ca.us). The Demographic and Economic Mapping System available on our website provides online interactive mapping of forecast data along with census and current demographic characteristics estimates. Customized data, reports and maps are available through SourcePoint, a non-profit corporation chartered by SANDAG. For information on these and other SourcePoint services, phone (619) 595-5353.

---

## *The Regional Economic*

### *Prosperity Strategy . . .*

*identifies specific steps*

*toward creating and*

*keeping the well-paying jobs*

*the region needs to raise*

*our standard of living*

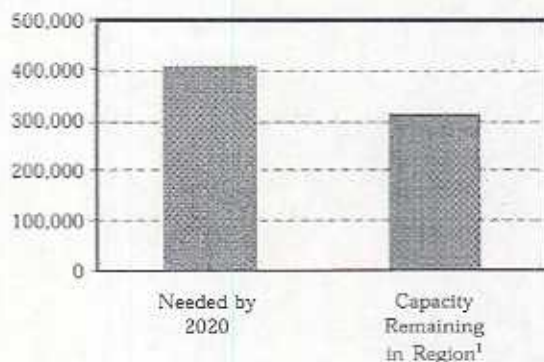
---

*Table 1*  
**2020 REGIONWIDE GROWTH FORECAST**

	1995	2020	Change 1995-2020	
			Numeric	Percent
Population	2,669,300	3,853,300	1,184,000	44%
Housing Units	996,500	1,404,100	407,600	41%
Civilian Jobs	1,084,900	1,627,900	543,000	50%

Source: SANDAG 2020 Cities/County Forecast, February, 1999

*Figure 1*  
**HOUSING UNITS NEEDED BY 2020 AND CAPACITY REMAINING IN REGION**



<sup>1</sup>Under current general and community plans.

## BACKGROUND

SANDAG has been producing long-range forecasts of population, housing and employment for the San Diego region since the early 1970s. While advances in computer technology and modeling techniques have altered the details of how the forecasts are produced, the basic, two-phase process remains the same. Phase One results in a forecast for the entire region. The 2020 Regionwide Forecast was released last year, and is described in detail in the May-June, 1999, No. 4, issue of *INFO*.

Over the years, the regionwide forecasts have had two characteristics in common: 1) They have proven accurate through comparisons to subsequent census counts and official state estimates, and 2) To whatever degree they are off, they have always been low. That is, they have consistently *underestimated* the future population by some small percentage.

Table 1 summarizes the 2020 Regionwide Forecast. It is important to note that most of the projected growth in population - about 60 percent - will be the result of natural increase (more births than deaths), not due to people moving here from outside the region.

Phase Two, the subject of this *INFO*, is far more challenging. Phase Two takes the Regionwide Forecast and allocates the future people, homes and jobs to the 18 cities and the unincorporated area to create the 2020 Cities/County Forecast. Prior to 1995, the allocation was based on the land use policies contained in the region's general plans and community plans. Today, however, those plans lack the capacity to accommodate the forecasted growth, which means a new approach is required.

## THE CAPACITY PROBLEM

The 2020 Regionwide Forecast indicates a need for about 408,000 new homes between 1995 and 2020 to accommodate the projected population growth. An analysis of the local plans and the land use data revealed the region has a remaining capacity for about 312,000 homes. In other words, under our current general and community plans, the potential supply of homes falls about 100,000 units short of demand over the forecast period. (See Figure 1.) Given this shortfall, a long-range Cities/County Forecast cannot be produced using the current plans and policies.

The collecting of existing and planned land use information also exposed an interesting anomaly regarding residential densities. Today, the overall density on all developed

residential land in the region's 18 cities is about 7.7 housing units per acre, a fairly low figure. However, as seen in Figure 2, the aggregate planned density for all currently vacant residential land (single family and multifamily) in our cities is only 3.7 units per acre.

About 90 percent of vacant residential land in the cities is planned for single family use, and Figure 2 indicates that it shows this same disparity. While existing single family densities average 5.5 units per acre, planned densities on now-vacant single family land average only 2.4 units per acre. In effect, we are planning for densities well below what most of us live in today.

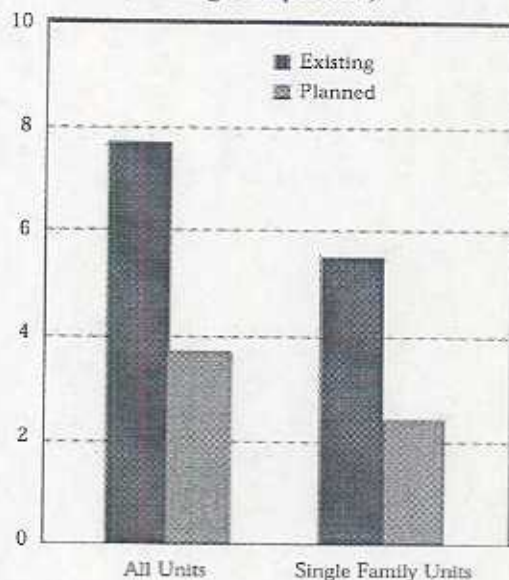
Figure 3 is a photograph of what 5.5 housing units per acre looks like. Most people would agree that this is not "dense housing." Simply raising planned single family densities to current levels would go a long way toward solving the capacity problem.

### SMART GROWTH

The growing pains we are experiencing - sprawl, traffic congestion, rising home prices - are not unique to the San Diego region. These are issues being grappled with in other parts of the state, and throughout the nation. Their origin was actually during the boom years of the late 1980s, although the recession provided a few years' respite. Now, with the economy back on track and expanding, we are again facing serious challenges.

Our region's unique geography also limits our growth options. With Mexico to the south, the ocean to the west, Camp Pendleton covering much of the north, and mountains and critical habitat to the east, the concept of smart growth is particularly important here.

Figure 2  
RESIDENTIAL DENSITIES'  
(Housing Units per Acre)

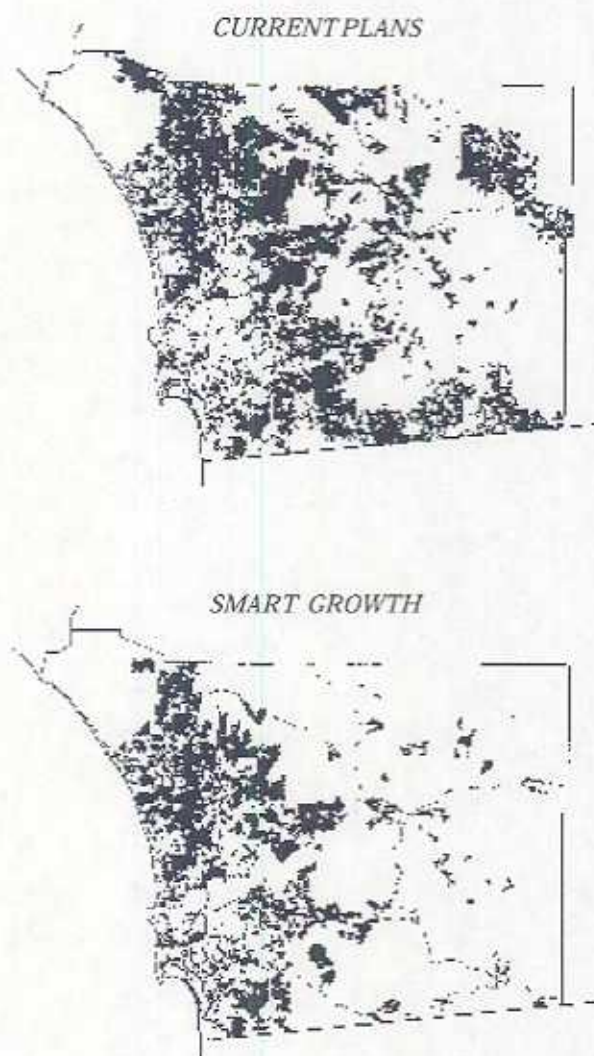


'Incorporated area only.

Figure 3  
Example of 5.5 Housing Units per Acre



Figure 4  
LIKELY DISTRIBUTION OF  
NEW HOUSING UNITS USING...



But what exactly does smart growth mean? The term has been around since the 1980s but has recently gained more widespread use and acceptance. Generally, smart growth policies seek to lessen the impacts of population and economic growth and reduce the loss of open space by directing future growth toward the urban areas, where most jobs are and where some infrastructure already exists.

In the San Diego region, smart growth is a popular name for concepts that have been a part of the Regional Growth Management Strategy for several years. The strategy, which has been approved by all 19 local governments, includes some specific policy recommendations for the jurisdictions:

- Locate highest densities near transit stations, along bus corridors and within traditional town centers.
- Encourage mixed land uses and mixed housing types, to provide people with more of a choice in housing.
- Where possible, include residential uses within or near major employment areas.

In the fall of 1998, SANDAG performed an analysis of four future land use scenarios. Its purpose was to compare continuing with our current land use plans to implementing smart growth policies in some manner. The relative impacts on land use, transportation, air quality and the cost of providing public services were studied. A summary report entitled *2020 Cities/County Forecast Land Use Alternatives* is available from the SANDAG office or website ([www.sandag.cog.ca.us](http://www.sandag.cog.ca.us)).

The results of the study are decisive, if not surprising. The most striking finding was the difference in land consumption. Under the smart growth scenarios, about 200,000 acres of land would be consumed between 1995 and 2020, mostly for residential use. However, if we are to continue with our current general and community plans, there is the potential to consume more than 600,000 acres of now-vacant land. Under the smart growth alternatives, much of that land could be preserved for habitat, recreational or agricultural uses.

The analysis also concluded that every transportation-related issue fared better under smart growth. It found less traffic congestion, shorter trips, lower travel costs, less air pollution and more transit use than would likely occur under existing policies by the year 2020.

Figure 4 compares how 408,000 new housing units would be distributed under current plans to the potential distribution of those same units using smart growth policies.

The 2020 Cities/County Forecast, summarized on the following pages, simulates the implementation of smart growth policies in the region. It assumes future changes in land uses around many of the 145 existing and future transit stations and six town center areas shown on Map 1. These changes may include increases in residential densities, employment densities, the amount of mixed land uses, or all three. As a result, the forecast exceeds the current capacities of all 18 general plans. The County of San Diego is currently involved in a three-year revamping of their general plan. The new plan will be designed to accommodate specific population targets for the year 2020. This forecast adheres to those targets.

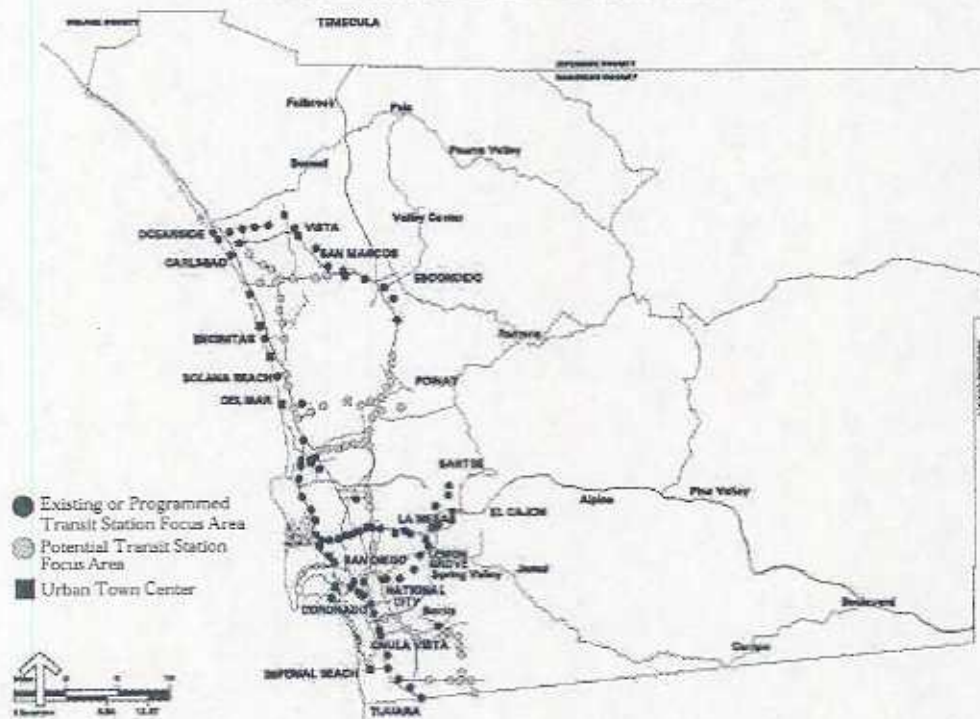
The 2020 Cities/County Forecast is based on the assumption that future growth will be accommodated in the region. It represents one possible allocation of that growth, using an equitable approach from a regional perspective. Ultimately, however, each jurisdiction must decide when and how to make the changes necessary to help ensure the region's sustainable and prosperous future.

---

*The 2020 Cities/County Forecast . . . simulates the implementation of smart growth policies in the region.*

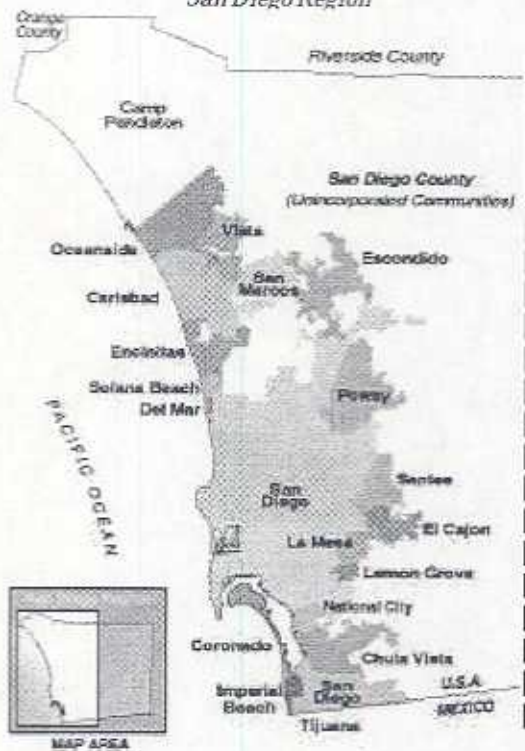
---

Map 1  
TRANSIT FOCUS AREAS AND TOWN CENTERS





Map 2  
**JURISDICTION BOUNDARIES**  
 San Diego Region



### JURISDICTION FORECASTS

Map 2 portrays the boundaries of each of the region's 19 jurisdictions. Tables 2 through 5 present population, housing, employment and jobs/housing data by jurisdiction.

#### Population

About 1.2 million people will be added to the region between 1995 and 2020, a 44 percent increase. (See Table 2.) Figure 5 shows that the growth rates will vary widely by jurisdiction. The City of Coronado's population will increase by only three percent, while Carlsbad will nearly double in size. However, as indicated in Figure 6, each jurisdiction's relative share of the regional population will remain fairly constant. The biggest difference is seen in the City of Chula Vista. With the construction of 23,000 new housing units in Otay Ranch, Chula Vista's share of the region's population will rise from 5.7 percent in 1995 to 7.1 percent by 2020.

#### Housing

Table 3 shows forecasted housing unit information by jurisdiction. Since housing unit growth closely follows population, the same trends noted in the previous "Population" section hold true for housing units.

Table 2  
**TOTAL POPULATION**  
 By Jurisdiction

Jurisdictions	1995	2005	2010	2020	Change 1995-2020	
					Numeric	Percent
Carlsbad	67,200	97,400	109,300	132,200	65,000	97%
Chula Vista	151,100	208,100	233,300	275,500	124,400	82%
Coronado	28,700	29,200	29,200	29,700	1,000	3%
Del Mar	5,100	5,500	5,700	6,100	1,000	20%
El Cajon	91,500	99,300	102,000	104,600	13,100	14%
Encinitas	56,800	66,600	68,400	70,800	14,000	25%
Escondido	117,500	136,200	140,500	143,200	25,700	22%
Imperial Beach	27,700	29,200	30,200	33,300	5,600	20%
La Mesa	56,300	61,800	64,000	66,800	10,500	19%
Lemon Grove	24,600	27,900	29,300	30,200	5,600	23%
National City	54,100	57,900	58,600	59,000	4,900	9%
Oceanside	145,900	184,100	196,600	202,600	56,700	39%
Poway	45,200	50,900	52,000	53,300	8,100	18%
San Diego	1,174,400	1,403,900	1,499,400	1,693,500	519,100	44%
San Marcos	47,400	67,500	75,400	91,600	44,200	93%
Santee	53,600	68,600	73,600	74,900	21,300	40%
Solana Beach	13,500	14,700	15,100	16,100	2,600	19%
Vista	79,500	95,600	101,400	103,300	23,800	30%
Unincorporated	429,200	519,000	553,600	666,600	237,400	55%
<b>Region</b>	<b>2,669,300</b>	<b>3,223,400</b>	<b>3,437,600</b>	<b>3,853,300</b>	<b>1,184,000</b>	<b>44%</b>

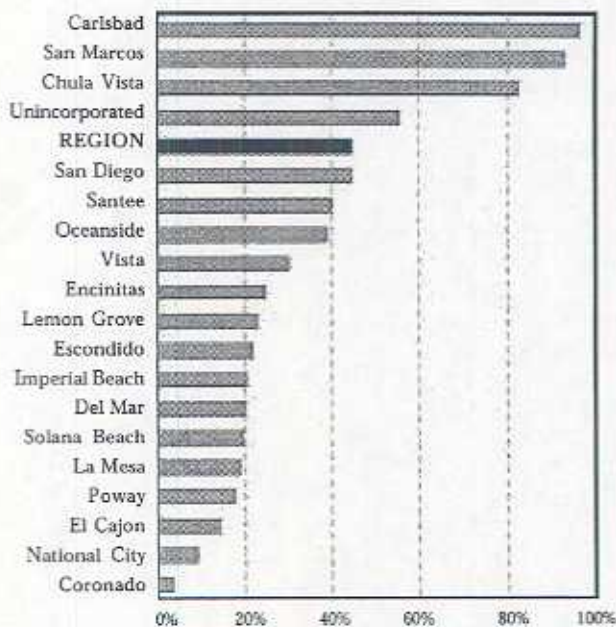
Source: SANDAG 2020 Cities/County Forecast, February, 1999

*Table 3*  
**TOTAL HOUSING UNITS**  
*By Jurisdiction*

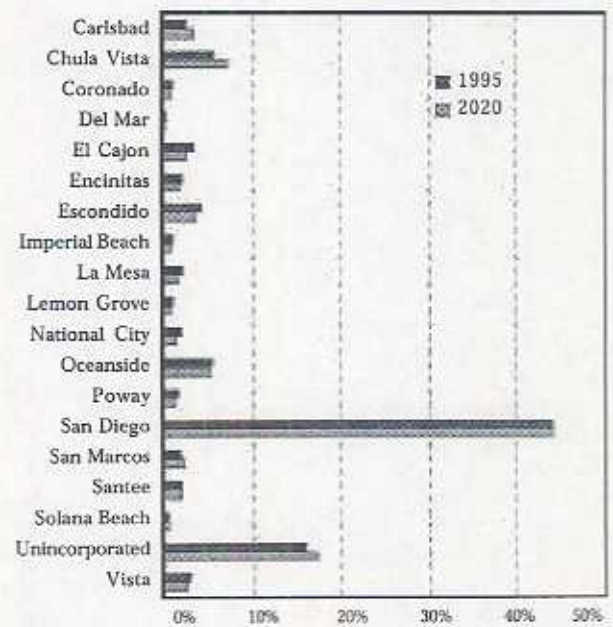
Jurisdictions	1995	2005	2010	2020	Change 1995-2020	
					Numeric	Percent
Carlsbad	28,900	40,300	45,800	55,100	26,200	91%
Chula Vista	54,000	70,900	80,800	96,500	42,500	79%
Coronado	9,500	9,700	9,900	10,100	600	6%
Del Mar	2,600	2,600	2,800	2,900	300	12%
El Cajon	34,700	36,000	37,300	38,500	3,800	11%
Encinitas	22,600	25,200	26,200	27,100	4,500	20%
Escondido	43,700	48,400	50,600	51,800	8,100	19%
Imperial Beach	9,900	10,000	10,400	11,500	1,600	16%
La Mesa	24,800	25,800	26,900	28,300	3,500	14%
Lemon Grove	8,800	9,600	10,100	10,500	1,700	19%
National City	15,400	16,000	16,300	16,500	1,100	7%
Oceanside	55,800	67,000	72,400	74,500	18,700	34%
Poway	15,100	16,400	16,900	17,400	2,300	15%
San Diego	453,500	518,800	559,300	631,200	177,700	39%
San Marcos	16,700	22,900	26,000	31,700	15,000	90%
Santee	18,600	22,800	24,700	25,100	6,500	35%
Solana Beach	6,400	6,600	6,900	7,300	900	14%
Vista	28,900	33,300	35,600	36,300	7,400	26%
Unincorporated	146,600	171,400	186,300	231,800	85,200	58%
Region	996,500	1,153,700	1,245,200	1,404,100	407,600	41%

Source: SANDAG 2020 Cities/County Forecast, February, 1999

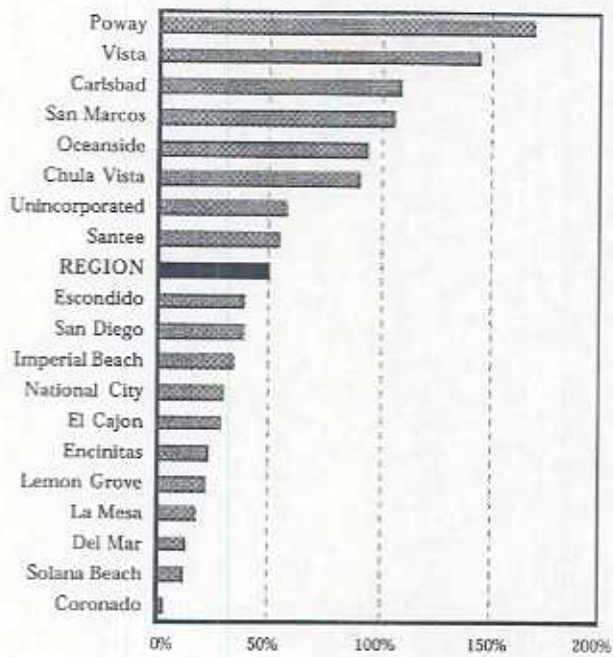
*Figure 5*  
**PERCENT INCREASE IN POPULATION**  
*1995-2020*



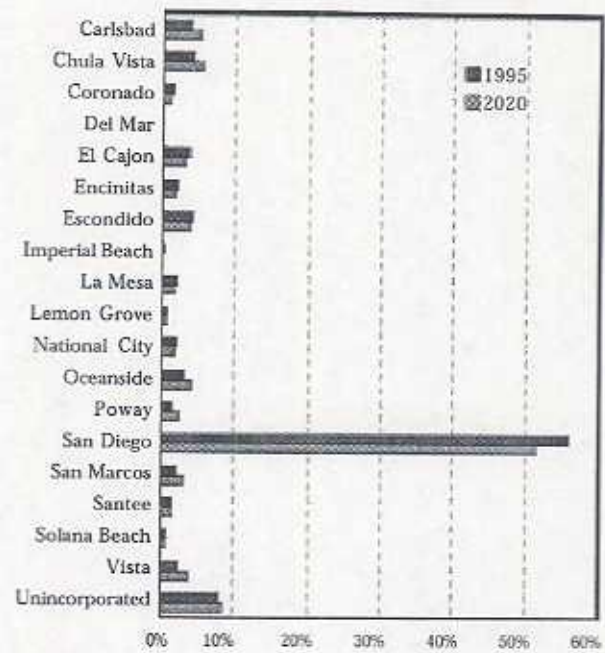
*Figure 6*  
**SHARE OF REGIONAL POPULATION**  
*1995 and 2020*



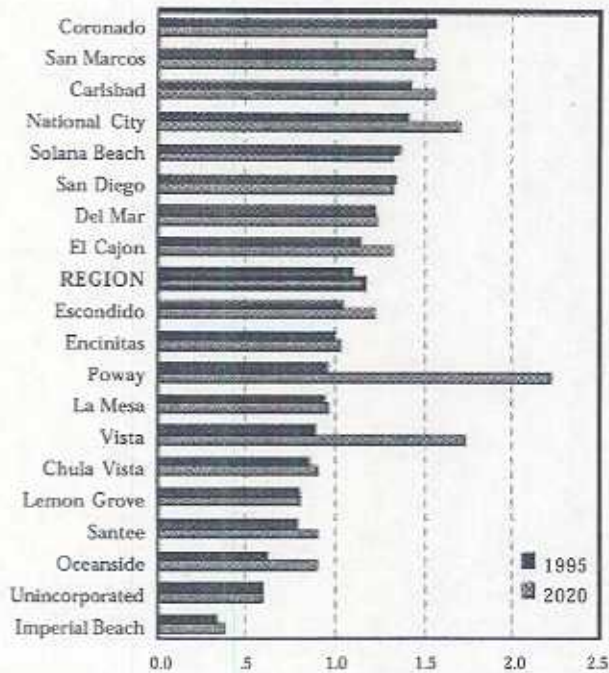
**Figure 7**  
**PERCENT INCREASE IN EMPLOYMENT**  
**1995-2020**



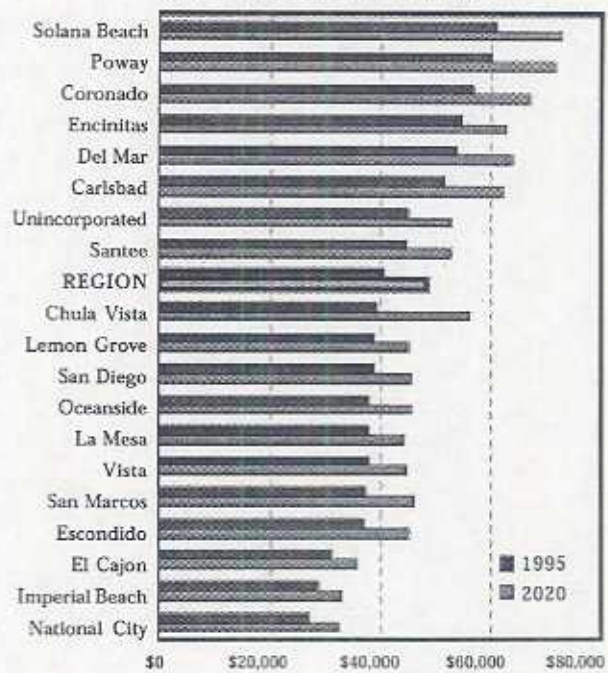
**Figure 8**  
**SHARE OF REGIONAL EMPLOYMENT**  
**1995-2020**



**Figure 9**  
**JOBS PER HOUSING UNIT**  
**1995 and 2020**



**Figure 10**  
**MEDIAN HOUSEHOLD INCOME**  
**1995 and 2020 (1995 Dollars)**



---

### *Employment*

Employment growth in the region will outpace population growth over the 25-year forecast period, just as it has for the past few decades. More than 540,000 civilian jobs will be added by 2020, a 50 percent increase. (See Table 4 on page 12.) As Figure 7 shows, four jurisdictions, the Cities of Poway, Vista, Carlsbad and San Marcos, will more than double their employment base. Four others, Coronado, Solana Beach, Del Mar and La Mesa, will grow by less than 20 percent. As with population, however, the disparate rates of employment growth will not significantly alter most jurisdictions' share of the region's jobs. The biggest change will be seen in the City of San Diego, whose share will drop from 56 percent in 1995 to 51 percent by 2020. (See Figure 8.)

### *Jobs/Housing Balance*

One goal of smart growth policies is a geographic balance of jobs and homes. In theory, this provides more opportunity for people to live closer to where they work. Regionally, there were 1.09 civilian jobs per housing unit in 1995. This figure rises to 1.16 by 2020. (See Table 5 on page 13.) Figure 9 shows the 1995 and 2020 jobs/housing ratios for each jurisdiction, listed in their 1995 order. The highest ratio in 1995 was found in the City of Coronado, due to the large civilian employment at North Island Naval Air Station. Seven other jurisdictions had ratios higher than the region in 1995. At the other end of the spectrum, Imperial Beach qualifies as a true bedroom community with a ratio of .33, or just one civilian job per three housing units.

The most significant changes in jobs/housing balance over the forecast period occur in Poway and Vista. Poway will gain three times as many jobs as homes by 2020, due to continuing development in its South Poway industrial area. Vista, which recorded the largest growth in employment of any city between 1990 and 1995, still has more than 1,000 acres of vacant land available for employment-related development.

### *Income*

Figure 10 presents median household income by jurisdiction for two points in time, 1995 and 2020. Eight jurisdictions had incomes higher than the regional figure in 1995. By 2020, Chula Vista will join the ranks of these higher-than-average-income jurisdictions, due in large part to the development of Otay Ranch. In fact, Chula Vista's household income figure, adjusted for inflation, rises by 44 percent over the forecast period - more than twice the regional rate of 20 percent.

---

*Employment growth in the  
region will outpace  
population growth . . .  
just as it has for the past  
few decades.*

---

*Table 4*  
**CIVILIAN EMPLOYMENT**  
*By Jurisdiction*

<u>Jurisdictions</u>	<u>1995</u>	<u>2005</u>	<u>2010</u>	<u>2020</u>	<u>Change 1995-2020</u>	
					<u>Numeric</u>	<u>Percent</u>
Carlsbad	41,200	69,600	73,900	86,200	45,000	109%
Chula Vista	46,000	67,600	73,200	87,500	41,500	90%
Coronado	14,900	15,200	15,300	15,300	400	3%
Del Mar	3,200	3,500	3,600	3,600	400	13%
El Cajon	39,800	46,400	47,700	50,900	11,100	28%
Encinitas	22,600	27,200	27,700	27,800	5,200	23%
Escondido	45,800	57,200	59,100	63,400	17,600	38%
Imperial Beach	3,300	4,100	4,200	4,400	1,100	33%
La Mesa	23,300	25,400	25,800	27,300	4,000	17%
Lemon Grove	7,000	8,100	8,300	8,500	1,500	21%
National City	21,800	25,400	26,000	28,100	6,300	29%
Oceanside	34,600	54,700	57,900	67,100	32,500	94%
Poway	14,400	33,100	35,200	38,800	24,400	169%
San Diego	606,600	747,100	768,200	836,900	230,300	38%
San Marcos	24,100	40,400	42,800	49,600	25,500	106%
Santee	14,700	20,100	21,000	22,600	7,900	54%
Solana Beach	8,700	9,200	9,300	9,700	1,000	11%
Vista	25,700	50,400	54,100	63,000	37,300	145%
Unincorporated	87,200	114,600	118,800	137,200	50,000	57%
<b>Region</b>	<b>1,084,900</b>	<b>1,419,300</b>	<b>1,472,100</b>	<b>1,627,900</b>	<b>543,000</b>	<b>50%</b>

Source: SANDAG 2020 Cities/County Forecast, February, 1999

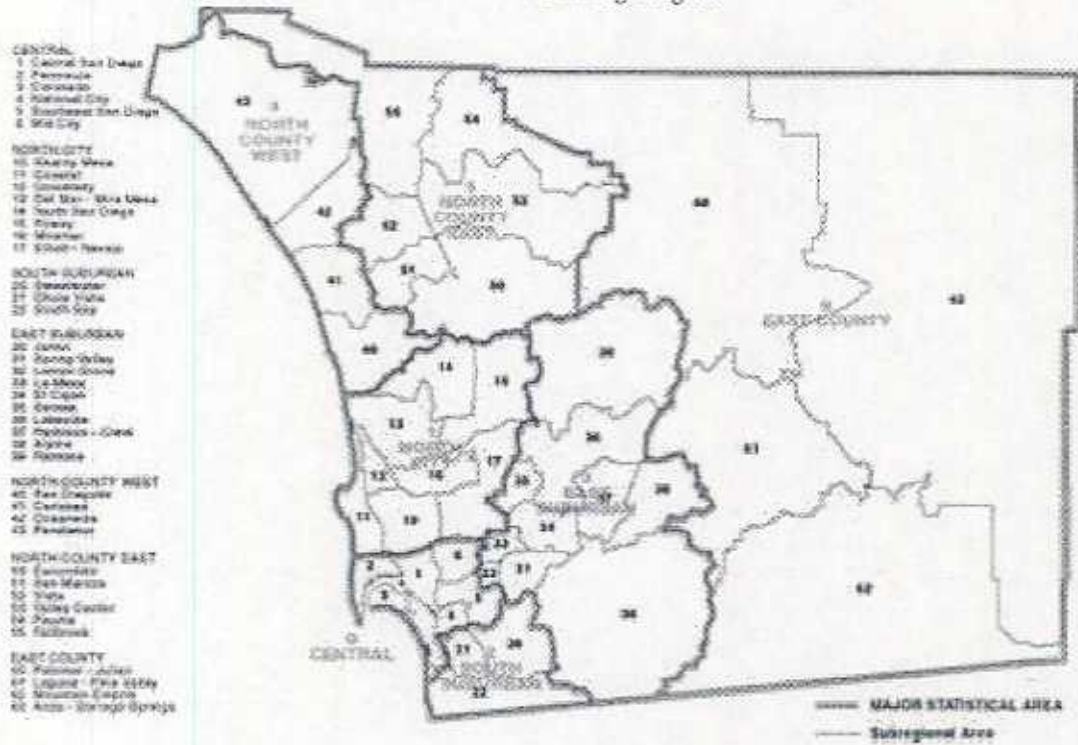
*Table 5*  
**JOB PER HOUSING UNIT**  
*By Jurisdiction*

Jurisdiction	1995	2005	2010	2020	Change 1995-2020	
					Numeric	Percent
Carlsbad	1.43	1.73	1.61	1.56	0.14	10%
Chula Vista	0.85	0.95	0.91	0.91	0.05	6%
Coronado	1.57	1.57	1.55	1.51	-0.05	-3%
Del Mar	1.23	1.35	1.29	1.24	0.01	1%
El Cajon	1.15	1.29	1.28	1.32	0.18	15%
Encinitas	1.00	1.08	1.06	1.03	0.03	3%
Escondido	1.05	1.18	1.17	1.22	0.18	17%
Imperial Beach	0.33	0.41	0.40	0.38	0.05	15%
La Mesa	0.94	0.98	0.96	0.96	0.03	3%
Lemon Grove	0.80	0.84	0.82	0.81	0.01	2%
National City	1.42	1.59	1.60	1.70	0.29	20%
Oceanside	0.62	0.82	0.80	0.90	0.28	45%
Poway	0.95	2.02	2.08	2.23	1.28	134%
San Diego	1.34	1.44	1.37	1.33	-0.01	-1%
San Marcos	1.44	1.76	1.65	1.56	0.12	8%
Santee	0.79	0.88	0.85	0.90	0.11	14%
Solana Beach	1.36	1.39	1.35	1.33	-0.03	-2%
Vista	0.89	1.51	1.52	1.74	0.85	95%
Unincorporated	0.59	0.67	0.64	0.59	0.00	0%
<b>Region</b>	<b>1.09</b>	<b>1.23</b>	<b>1.18</b>	<b>1.16</b>	<b>0.07</b>	<b>6%</b>

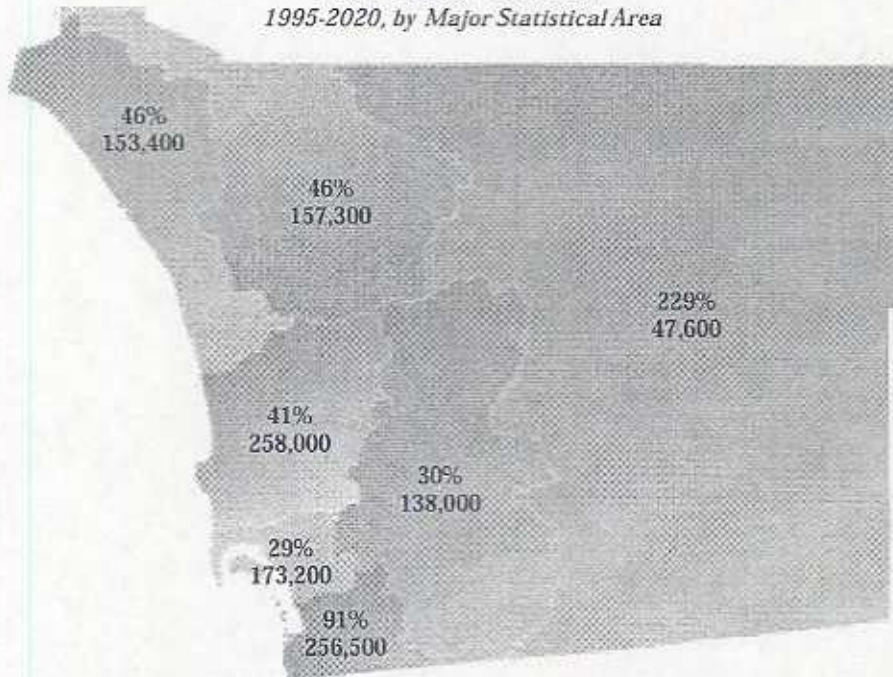
Note: Totals may be affected by rounding.

Source: SANDAG 2020 Cities/County Forecast, February, 1999

MAP 3  
 MAJOR STATISTICAL AREA AND SUBREGIONAL AREA BOUNDARIES  
 San Diego Region



Map 4  
 POPULATION GROWTH  
 1995-2020, by Major Statistical Area



---

### ***SUBREGIONAL AREA (SRA) FORECASTS***

It is often useful to look at forecast data for geographic areas smaller than jurisdictions. Subregional Areas (SRAs) are groups of census tracts; Major Statistical Areas (MSAs) are groups of SRAs. The 41 SRAs and seven MSAs are depicted in Map 3. SRA and MSA boundaries have stayed the same over time, while jurisdiction boundaries change due to incorporations and annexations. Examining data for SRAs and MSAs allows for comparisons to be made over time for the same geographic area. *(Note: Although some SRA names are the same as cities or community planning areas, their boundaries are different. A large-scale, more detailed map of SRAs and MSAs is available from SANDAG.)*

The 2020 Cities/County Forecast projects the region will add 1.2 million people between 1995 and 2020. Map 4 shows the forecast's distribution of the new population by Major Statistical Area. The smart growth principles on which the forecast is based are evident in this depiction: the majority of the future growth is directed into the current urban areas. This more compact form of development reduces congestion and sprawl while preserving open space and habitat.

Tables 6 through 9 present population, housing, employment and jobs/housing information for SRAs and MSAs.

### ***FORECAST METHODOLOGY***

Producing the forecast is a two-phase process, with the first being a regionwide forecast and the second being the allocation to smaller geographic areas within the region. The computer models that perform the allocation require very detailed land use information as inputs. SANDAG uses a geographic information system (GIS) to store, edit, process and display such data. Collecting and confirming the land use information is a labor-intensive, year-long process. Working closely with local planners, SANDAG build GIS data bases for 100 planning areas containing planned land uses, existing land uses, constraints to development, potential redevelopment areas, potential infill areas, and, current construction projects.

The data bases were merged through an electronic overlay process within the GIS. From the merged data a final map was returned to the local planners for review. This map depicted the specific size, shape and location of all vacant, developable (i.e., not constrained) land within their planning area. These areas, and the areas identified by the planners as having the potential for redevelopment or infill, are where the forecasting models place the future development.



*Table 6*  
**TOTAL POPULATION**  
*By Subregional Area and Major Statistical Area*

SRA/MSA	1995	2005	2010	2020	Change 1995-2020	
					Numeric	Percent
1 Central San Diego	159,800	188,800	202,000	243,400	83,600	52%
2 Peninsula	62,600	67,700	68,900	73,100	10,500	17%
3 Coronado	28,700	29,200	29,200	29,700	1,000	3%
4 National City	53,900	57,600	58,000	58,100	4,200	8%
5 Southeast San Diego	151,500	165,100	172,100	197,800	46,300	31%
6 Mid-City	151,100	165,700	169,200	178,600	27,500	18%
<b>0 Central MSA</b>	<b>607,600</b>	<b>674,100</b>	<b>699,400</b>	<b>780,700</b>	<b>173,100</b>	<b>28%</b>
10 Kearny Mesa	140,500	156,400	163,000	176,100	35,600	25%
11 Coastal	76,900	84,300	84,100	83,300	6,400	8%
12 University	48,600	55,700	59,800	65,000	16,400	34%
13 Del Mar-Mira Mesa	117,300	174,200	199,100	227,200	109,900	94%
14 North San Diego	79,700	109,200	122,000	131,600	51,900	65%
15 Poway	68,200	94,300	96,000	97,500	29,300	43%
16 Miramar	4,600	4,400	4,300	4,300	-300	-7%
17 Elliott-Navajo	90,500	96,900	97,100	99,200	8,700	10%
<b>1 North City MSA</b>	<b>626,300</b>	<b>775,400</b>	<b>825,400</b>	<b>884,200</b>	<b>257,900</b>	<b>41%</b>
20 Sweetwater	58,000	110,400	133,000	165,100	107,100	185%
21 Chula Vista	103,500	111,500	114,600	120,000	16,500	16%
22 South Bay	119,900	157,300	187,300	252,700	132,800	111%
<b>2 South Suburban MSA</b>	<b>281,400</b>	<b>379,200</b>	<b>434,900</b>	<b>537,800</b>	<b>256,400</b>	<b>91%</b>
30 Jamul	10,900	15,900	20,600	36,200	25,300	232%
31 Spring Valley	78,700	87,900	88,800	90,400	11,700	15%
32 Lemon Grove	29,000	32,900	34,200	35,100	6,100	21%
33 La Mesa	58,400	64,000	66,100	69,000	10,600	18%
34 El Cajon	115,900	127,000	129,600	132,300	16,400	14%
35 Santee	52,300	64,800	69,800	70,200	17,900	34%
36 Lakeside	52,300	64,100	65,900	68,500	16,200	31%
37 Harbison Crest	14,900	17,300	17,600	19,200	4,300	29%
38 Alpine	12,600	14,200	15,500	22,600	10,000	79%
39 Ramona	30,900	37,600	41,100	50,300	19,400	63%
<b>3 East Suburban MSA</b>	<b>455,900</b>	<b>525,700</b>	<b>549,200</b>	<b>593,800</b>	<b>137,900</b>	<b>30%</b>
40 San Dieguito	80,500	97,700	102,300	109,000	28,500	35%
41 Carlsbad	81,400	112,400	123,300	146,000	64,600	79%
42 Oceanside	137,600	175,200	188,300	194,800	57,200	42%
43 Pendleton	33,900	37,300	37,100	37,000	3,100	9%
<b>4 North County West MSA</b>	<b>333,400</b>	<b>422,600</b>	<b>451,000</b>	<b>486,800</b>	<b>153,400</b>	<b>46%</b>
50 Escondido	132,800	158,900	168,200	180,400	47,600	36%
51 San Marcos	80,200	77,600	82,700	95,700	35,500	59%
52 Vista	87,100	102,800	109,300	115,500	28,400	33%
53 Valley Center	18,000	24,500	28,300	40,200	22,200	123%
54 Pauma	5,100	5,700	6,300	9,900	4,800	94%
55 Fallbrook	40,900	49,200	53,200	59,800	18,900	46%
<b>5 North County East MSA</b>	<b>344,100</b>	<b>418,700</b>	<b>448,000</b>	<b>501,500</b>	<b>157,400</b>	<b>46%</b>
60 Palomar-Julian	5,900	7,200	7,400	8,300	2,400	41%
61 Laguna-Pine Valley	5,300	6,200	6,300	7,700	2,400	45%
62 Mountain Empire	6,000	7,500	8,000	14,600	8,600	143%
63 Anza-Borrego Springs	3,500	7,000	8,400	37,800	34,300	980%
<b>6 East County MSA</b>	<b>20,700</b>	<b>27,900</b>	<b>30,100</b>	<b>68,400</b>	<b>47,700</b>	<b>230%</b>
<b>REGION</b>	<b>2,669,300</b>	<b>3,223,400</b>	<b>3,437,600</b>	<b>3,853,300</b>	<b>1,184,000</b>	<b>44%</b>

*Table 7*  
**TOTAL HOUSING UNITS**  
*By Subregional Area and Major Statistical Area*

SRA/MSA	1995	2005	2010	2020	Change 1995-2020	
					Numeric	Percent
1 Central San Diego	69,100	79,600	86,900	106,300	37,200	54%
2 Peninsula	26,600	27,900	28,600	30,600	4,000	15%
3 Coronado	9,500	9,700	9,900	10,100	600	6%
4 National City	15,400	15,900	16,100	16,300	900	6%
5 Southeast San Diego	43,200	45,600	48,200	56,300	13,100	30%
6 Mid-City	60,300	63,000	64,800	68,500	8,200	14%
<b>0 Central MSA</b>	<b>224,100</b>	<b>241,700</b>	<b>254,500</b>	<b>288,100</b>	<b>64,000</b>	<b>29%</b>
10 Kearny Mesa	56,100	60,400	64,200	71,200	15,100	27%
11 Coastal	40,700	41,900	42,200	41,700	1,000	2%
12 University	22,500	24,600	26,900	29,600	7,100	32%
13 Del Mar-Mira Mesa	41,300	60,300	70,600	81,200	39,900	97%
14 North San Diego	31,900	42,000	47,600	51,200	19,300	61%
15 Poway	24,600	32,800	33,700	34,400	9,800	40%
16 Miramar	600	600	600	600	0	0%
17 Elliott-Navajo	35,300	36,200	36,700	37,500	2,200	6%
<b>1 North City MSA</b>	<b>253,000</b>	<b>298,888</b>	<b>322,500</b>	<b>347,400</b>	<b>94,400</b>	<b>37%</b>
20 Sweetwater	18,400	35,000	43,500	55,400	37,000	201%
21 Chula Vista	38,700	39,900	41,500	43,800	5,100	13%
22 South Bay	33,800	41,900	50,000	67,400	33,600	99%
<b>2 South Suburban MSA</b>	<b>90,900</b>	<b>116,800</b>	<b>135,000</b>	<b>166,600</b>	<b>75,700</b>	<b>83%</b>
30 Jamul	3,500	5,100	6,800	11,900	8,400	240%
31 Spring Valley	26,700	28,700	29,300	29,800	3,100	12%
32 Lemon Grove	10,100	11,000	11,500	11,900	1,800	18%
33 La Mesa	25,600	26,800	27,700	29,000	3,400	13%
34 El Cajon	43,600	45,600	47,000	48,300	4,700	11%
35 Santee	17,900	21,400	23,100	23,300	5,400	30%
36 Lakeside	18,600	21,900	22,700	23,600	5,000	27%
37 Harbison Crest	5,200	5,800	6,000	6,600	1,400	27%
38 Alpine	4,800	5,200	5,700	6,500	1,700	35%
39 Ramona	10,500	12,200	13,500	16,600	6,100	58%
<b>3 East Suburban MSA</b>	<b>166,500</b>	<b>183,500</b>	<b>193,300</b>	<b>209,500</b>	<b>43,000</b>	<b>26%</b>
40 San Dieguito	32,800	37,700	39,900	42,500	9,700	30%
41 Carlsbad	34,500	45,900	51,000	60,300	25,800	75%
42 Oceanside	52,200	63,300	68,800	71,100	18,900	36%
43 Pendleton	5,800	5,800	5,800	5,800	0	0%
<b>4 North County West MSA</b>	<b>125,300</b>	<b>152,700</b>	<b>165,500</b>	<b>179,700</b>	<b>54,400</b>	<b>43%</b>
50 Escondido	48,300	55,500	59,400	64,000	15,700	33%
51 San Marcos	22,800	27,900	30,100	34,800	12,000	53%
52 Vista	31,400	35,500	38,100	40,300	8,900	28%
53 Valley Center	7,000	8,700	10,200	14,600	7,600	109%
54 Pauma	1,600	1,800	2,000	3,200	1,600	100%
55 Fallbrook	14,800	17,000	18,600	21,200	6,400	43%
<b>5 North County East MSA</b>	<b>125,900</b>	<b>146,400</b>	<b>158,400</b>	<b>178,100</b>	<b>52,200</b>	<b>41%</b>
60 Palomar-Julian	3,300	3,600	3,800	4,400	1,100	33%
61 Laguna-Pine Valley	2,100	2,300	2,400	2,900	800	38%
62 Mountain Empire	2,800	3,200	3,400	6,700	3,900	139%
63 Anza-Borrego Springs	2,800	4,800	6,100	20,700	17,900	639%
<b>6 East County MSA</b>	<b>11,000</b>	<b>13,900</b>	<b>15,700</b>	<b>34,700</b>	<b>23,700</b>	<b>215%</b>
<b>REGION</b>	<b>996,500</b>	<b>1,153,700</b>	<b>1,245,200</b>	<b>1,404,100</b>	<b>407,600</b>	<b>41%</b>

Source: SANDAG 2020 Cities/County Forecast, February, 1999

*Table 8*  
**CIVILIAN EMPLOYMENT**  
*By Subregional Area and Major Statistical Area*

SRA/MSA	1995	2005	2010	2020	Change 1995-2020	
					Numeric	Percent
1 Central San Diego	130,000	149,800	152,200	161,200	31,200	24%
2 Peninsula	43,500	48,000	49,100	51,600	8,100	19%
3 Coronado	14,900	15,200	15,300	15,300	400	3%
4 National City	20,400	23,200	24,000	26,200	5,800	28%
5 Southeast San Diego	15,000	17,100	17,500	18,800	3,800	25%
6 Mid-City	32,900	36,400	36,900	38,500	5,600	17%
<b>0 Central MSA</b>	<b>256,700</b>	<b>289,700</b>	<b>295,000</b>	<b>311,600</b>	<b>54,900</b>	<b>21%</b>
10 Kearny Mesa	133,100	152,300	155,000	165,400	32,300	24%
11 Coastal	37,800	39,900	40,300	42,400	4,600	12%
12 University	57,200	71,700	73,500	78,200	21,000	37%
13 Del Mar-Mira Mesa	77,300	108,000	111,500	121,900	44,600	58%
14 North San Diego	35,000	51,500	54,500	59,000	24,000	69%
15 Poway	22,300	44,100	47,200	53,200	30,900	139%
16 Miramar	2,500	2,500	2,500	2,600	100	4%
17 Elliott-Navajo	21,300	25,500	25,700	26,100	4,800	23%
<b>1 North City MSA</b>	<b>386,500</b>	<b>495,500</b>	<b>510,200</b>	<b>548,800</b>	<b>162,300</b>	<b>42%</b>
20 Sweetwater	12,900	29,900	34,400	45,900	33,000	256%
21 Chula Vista	36,100	41,200	42,200	44,800	8,700	24%
22 South Bay	23,000	48,900	53,700	74,200	51,200	223%
<b>2 South Suburban MSA</b>	<b>72,000</b>	<b>120,000</b>	<b>130,000</b>	<b>164,900</b>	<b>92,900</b>	<b>129%</b>
30 Jamul	2,000	3,400	3,900	6,400	4,400	220%
31 Spring Valley	13,400	16,600	17,000	18,200	4,800	36%
32 Lemon Grove	6,200	7,400	7,600	7,600	1,400	23%
33 La Mesa	23,500	25,600	26,000	27,500	4,000	17%
34 El Cajon	43,600	50,900	51,900	54,500	10,900	25%
35 Santee	14,500	19,600	20,800	22,800	8,300	57%
36 Lakeside	8,700	13,200	13,900	15,200	6,500	75%
37 Harbison Crest	2,200	2,800	2,900	3,100	900	41%
38 Alpine	3,700	5,100	5,200	5,900	2,200	59%
39 Ramona	6,600	9,400	9,900	11,400	4,800	73%
<b>3 East Suburban MSA</b>	<b>124,400</b>	<b>154,000</b>	<b>159,100</b>	<b>172,600</b>	<b>48,200</b>	<b>39%</b>
40 San Dieguito	34,700	41,100	41,900	44,000	9,300	27%
41 Carlsbad	44,200	77,200	81,500	93,000	48,800	110%
42 Oceanside	33,000	49,700	52,700	62,300	29,300	89%
43 Pendleton	7,500	7,500	7,500	7,500	0	0%
<b>4 North County West MSA</b>	<b>119,400</b>	<b>175,500</b>	<b>183,600</b>	<b>206,800</b>	<b>87,400</b>	<b>73%</b>
50 Escondido	49,900	63,500	65,700	71,000	21,100	42%
51 San Marcos	30,200	55,600	58,500	67,500	37,300	124%
52 Vista	22,000	35,300	38,300	44,900	22,900	104%
53 Valley Center	4,000	5,100	5,200	5,800	1,800	45%
54 Pauma	900	1,100	1,100	1,200	300	33%
55 Fallbrook	12,700	16,000	16,400	17,800	5,100	40%
<b>5 North County East MSA</b>	<b>119,700</b>	<b>176,600</b>	<b>185,200</b>	<b>208,200</b>	<b>88,500</b>	<b>74%</b>
60 Palomar-Julian	2,000	2,500	2,500	2,800	800	40%
61 Laguna-Pine Valley	1,000	1,000	1,000	1,100	100	10%
62 Mountain Empire	1,900	2,800	2,900	3,600	1,700	89%
63 Anza-Borrego Springs	1,200	2,000	2,100	7,300	6,100	508%
<b>6 East County MSA</b>	<b>6,100</b>	<b>8,300</b>	<b>8,500</b>	<b>14,800</b>	<b>8,700</b>	<b>143%</b>
<b>REGION</b>	<b>1,084,900</b>	<b>1,419,300</b>	<b>1,472,100</b>	<b>1,627,900</b>	<b>543,000</b>	<b>50%</b>

Source: SANDAG 2020 Cities/County Forecast, February, 1999

*Table 9*  
**JOBS PER HOUSING UNIT**  
*By Subregional Area and Major Statistical Area*

SRA/MSA	1995	2005	2010	2020	Change 1995-2020	
					Numeric	Percent
1 Central San Diego	1.88	1.88	1.75	1.52	-0.36	-19%
2 Peninsula	1.64	1.72	1.72	1.69	0.05	3%
3 Coronado	1.57	1.57	1.55	1.51	-0.05	-3%
4 National City	1.32	1.46	1.49	1.61	0.28	21%
5 Southeast San Diego	0.35	0.38	0.36	0.33	-0.01	-4%
6 Mid-City	0.55	0.58	0.57	0.56	0.02	3%
<b>0 Central MSA</b>	<b>1.15</b>	<b>1.20</b>	<b>1.16</b>	<b>1.08</b>	<b>-0.06</b>	<b>-6%</b>
10 Kearny Mesa	2.37	2.52	2.41	2.32	-0.05	-2%
11 Coastal	0.93	0.95	0.95	1.02	0.09	9%
12 University	2.54	2.91	2.73	2.64	0.10	4%
13 Del Mar-Mira Mesa	1.87	1.79	1.58	1.50	-0.37	-20%
14 North San Diego	1.10	1.23	1.14	1.15	0.06	5%
15 Poway	0.91	1.34	1.40	1.55	0.64	71%
16 Miramar	4.17	4.17	4.17	4.33	0.17	4%
17 Elliott-Navajo	0.60	0.70	0.70	0.70	0.09	15%
<b>1 North City MSA</b>	<b>1.53</b>	<b>1.66</b>	<b>1.58</b>	<b>1.58</b>	<b>0.05</b>	<b>3%</b>
20 Sweetwater	0.70	0.85	0.79	0.83	0.13	18%
21 Chula Vista	0.93	1.03	1.02	1.02	0.09	10%
22 South Bay	0.68	1.17	1.07	1.10	0.42	62%
<b>2 South Suburban MSA</b>	<b>0.79</b>	<b>1.03</b>	<b>0.97</b>	<b>0.99</b>	<b>0.20</b>	<b>25%</b>
30 Jamul	0.57	0.67	0.57	0.54	-0.03	-6%
31 Spring Valley	0.50	0.58	0.58	0.61	0.11	22%
32 Lemon Grove	0.61	0.67	0.66	0.64	0.02	4%
33 La Mesa	0.92	0.96	0.94	0.95	0.03	3%
34 El Cajon	1.00	1.12	1.10	1.13	0.13	13%
35 Santee	0.81	0.92	0.90	0.98	0.17	21%
36 Lakeside	0.47	0.60	0.61	0.64	0.18	38%
37 Harbison Crest	0.42	0.48	0.48	0.47	0.05	11%
38 Alpine	0.77	0.98	0.91	0.69	-0.08	-10%
39 Ramona	0.63	0.77	0.73	0.69	0.06	9%
<b>3 East Suburban MSA</b>	<b>0.75</b>	<b>0.84</b>	<b>0.82</b>	<b>0.82</b>	<b>0.08</b>	<b>10%</b>
40 San Dieguito	1.06	1.09	1.05	1.04	-0.02	-2%
41 Carlsbad	1.28	1.68	1.60	1.54	0.26	20%
42 Oceanside	0.63	0.79	0.77	0.88	0.24	39%
43 Pendleton	1.29	1.29	1.29	1.29	0.00	0%
<b>4 North County West MSA</b>	<b>0.95</b>	<b>1.15</b>	<b>1.11</b>	<b>1.15</b>	<b>0.20</b>	<b>21%</b>
50 Escondido	1.03	1.14	1.11	1.11	0.08	7%
51 San Marcos	1.32	1.99	1.94	1.94	0.62	46%
52 Vista	0.70	0.99	1.01	1.11	0.41	59%
53 Valley Center	0.57	0.59	0.51	0.40	-0.17	-30%
54 Pauma	0.56	0.61	0.55	0.38	-0.19	-33%
55 Fallbrook	0.86	0.94	0.88	0.84	-0.02	-2%
<b>5 North County East MSA</b>	<b>0.95</b>	<b>1.21</b>	<b>1.17</b>	<b>1.17</b>	<b>0.22</b>	<b>23%</b>
60 Palomar-Julian	0.61	0.69	0.66	0.64	0.03	5%
61 Laguna-Pine Valley	0.48	0.43	0.42	0.38	-0.10	-20%
62 Mountain Empire	0.68	0.88	0.85	0.54	-0.14	-21%
63 Anza-Borrego Springs	0.43	0.42	0.34	0.35	-0.08	-18%
<b>6 East County MSA</b>	<b>0.55</b>	<b>0.60</b>	<b>0.54</b>	<b>0.43</b>	<b>-0.13</b>	<b>-23%</b>
<b>REGION</b>	<b>1.09</b>	<b>1.23</b>	<b>1.18</b>	<b>1.16</b>	<b>0.07</b>	<b>6%</b>

Note: Totals may be affected by rounding.  
Source: SANDAG 2020 Cities/County Forecast, February, 1999