Agenda

• Forecast overview and model structure
• Key assumptions
  • Demographic factors
  • Economic trends
Forecast process and new models

**Regionwide Forecast (DEFM)**
- Historical data
- Current demographics
- National forecast
- Demographic trends
- Expert review

**Subregional Forecast (PECAS and PD)**
- Local land plans & policies
- Market conditions
- Local review

**Detailed Demographic Forecast (PASEF and PopSyn)**

**Transportation Model (ABM)**
Statewide (-15%) :
2007 California forecast = 59.5 million
2013 California forecast = 50.4 million
2050 California Growth By County

- San Joaquin Valley: 25 percent of new growth
- Nearly 50 percent of new growth in Southern California
- 6 percent of new growth in San Diego

Change in Total Population: 2010 - 2050

- Declining Population
- Less Than 25 Percent
- 25 Percent to 50 Percent
- 50 Percent to 100 Percent
- Greater than 100 Percent

Note: Boxes represents range of forecast predictions. For example, SANDAG has provided a projection for 2005 since Series 4 through Series 11. The lowest projection was 2.8 million. The highest projection was 3.3 million. The average projection was just over 3 million. The actual population in 2005 was just over 3 million as well.
Population, Jobs, and Housing

2010 - 2050
973,000 more people
479,000 more jobs
333,000 more housing units

973,000 more people
479,000 more jobs
333,000 more housing units
Components of Change

San Diego Population

- Births
- Deaths
- Domestic Migrants
- International Migrants

Result
Population: Rate of Change

Annual Rate of Change

Pop Change

0.0% 0.5% 1.0% 1.5% 2.0% 2.5%

**Fertility Rates**

**Historical source**: California Department of Health, Vital Statistics (1980 data is U.S. rate from CDC)

Life Expectancy

Updated to reflect 2012 projections from U.S. Census Bureau

Historical source: California Department of Health, Vital Statistics (1990 data for Asian reflects a composite of all Asian/other records)

Projection assumption: Life expectancies updated to reflect 2012 Census projections (except where San Diego base year and future assumptions were higher than national average)
Distribution of International Migrants

Hispanic, 49%
White, 17%
Black, 5%
Asian, 25%
Other Races, 2%
2 or More Races, 2%

International Migrants
46% male
54% female

Historical source: 2006-2010 American Community Survey and 2011 American Community Survey persons “Foreign born; Entered 2000 or later”

Projection assumption: Held constant.
## Domestic Migration Patterns

<table>
<thead>
<tr>
<th>Destination County</th>
<th>Estimated Outflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Riverside (CA)</td>
<td>14,673</td>
</tr>
<tr>
<td>Los Angeles (CA)</td>
<td>11,234</td>
</tr>
<tr>
<td>Orange (CA)</td>
<td>6,926</td>
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<tr>
<td>Maricopa (AZ)</td>
<td>6,693</td>
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<tr>
<td>San Bernardino (CA)</td>
<td>3,870</td>
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<td>Clark (NV)</td>
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<tr>
<td>San Francisco (CA)</td>
<td>2,313</td>
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<tr>
<td>Alameda (CA)</td>
<td>2,246</td>
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<tr>
<td>Pima (AZ)</td>
<td>2,164</td>
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<tr>
<td>Santa Clara (CA)</td>
<td>2,101</td>
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</table>

<table>
<thead>
<tr>
<th>Origin County</th>
<th>Estimated Inflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles (CA)</td>
<td>16,330</td>
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<tr>
<td>Orange (CA)</td>
<td>9,321</td>
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<tr>
<td>Riverside (CA)</td>
<td>8,709</td>
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<td>San Bernardino (CA)</td>
<td>4,203</td>
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<tr>
<td>Maricopa (AZ)</td>
<td>4,156</td>
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<tr>
<td>Santa Clara (CA)</td>
<td>3,640</td>
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<td>Clark (NV)</td>
<td>2,200</td>
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<td>Honolulu (HI)</td>
<td>2,167</td>
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<td>Ventura (CA)</td>
<td>2,137</td>
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<tr>
<td>Imperial (CA)</td>
<td>1,874</td>
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</tbody>
</table>

**Source:** American Community Survey, 2005-2009
Race/Ethnicity

2010

- Hispanic: 32%
- White: 48%
- Black: 5%
- Asian: 11%
- Other Races: 1%
- 2 or More Races: 3%

2050

- Hispanic: 46%
- White: 30%
- Black: 4%
- Asian: 16%
- Other: <1%
- 2 or More Races: 4%
Key Economic Assumptions

- Housing Market
- Job Market
  - Labor force participation
  - Unemployment
  - Job growth
Annual Change Households & Units

Change in Households/Units

Unit Change from Prior Year
Household Change from Prior Year
Comparison/Result

U.S. and San Diego Vacancy Rate

Vacancy Rate

- San Diego
- United States

U.S. and San Diego Job Growth

Historical source: California Employment Development Department and U.S. Bureau of Labor Statistics

Projection assumption: Job growth is the sum of individual industry sector projections
U.S. and San Diego Unemployment

Unemployment Rate

Historical source: California Employment Development Department and U.S. Bureau of Labor Statistics

Projection assumption: Net result of labor force and employed residents
Distribution of Jobs by Industry

Historical source: QCEW California Employment Development Dept. (annual average)

Projection assumption: Each industry’s jobs forecast is driven by US job growth by industry and a local market index
**Population, Jobs, and Housing**

- **Population**: 4,068,759 (2010 - 2050)
  - 973,000 more people
- **Jobs**: 1,911,404
  - 479,000 more jobs
- **Housing**: 1,491,189
  - 333,000 more housing units

**Result**

- **2010 - 2050**
  - 973,000 more people
  - 479,000 more jobs
  - 333,000 more housing units
Schedule and next steps

March 2013
• Complete collection and review of land use inputs

April 2013
• Sub-regional forecast runs
• Preliminary sub-regional forecast results for TWG review

May – June 2013
• Adjustments / updates from TWG / Local Jurisdictions

Summer 2013
• Draft sub-regional forecast to Stakeholders and Board
Population, Jobs, and Housing

Result

- Population: 2010 - 2050
  - 973,000 more people
  - 479,000 more jobs
  - 333,000 more housing units