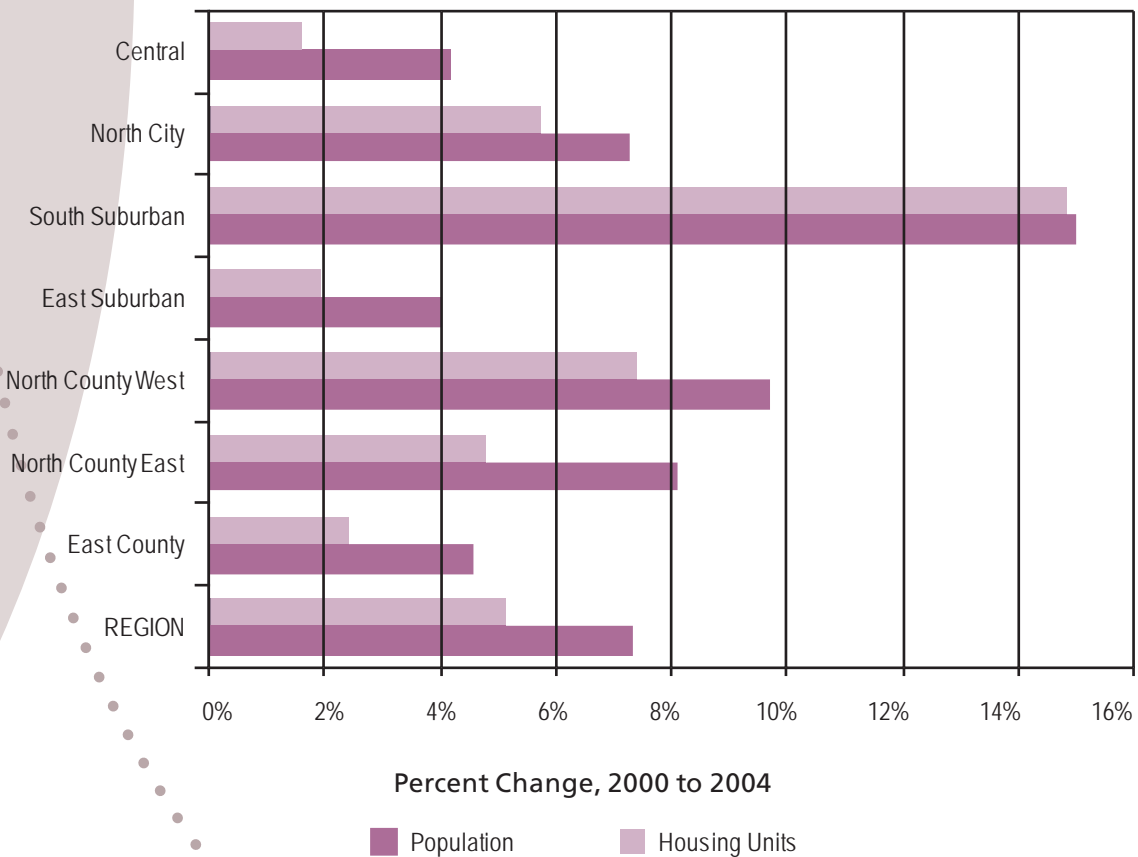


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Population and Housing Estimates San Diego Region

Population Growth Outpaces Housing Growth Major Statistical Areas*



* See map on page 4.

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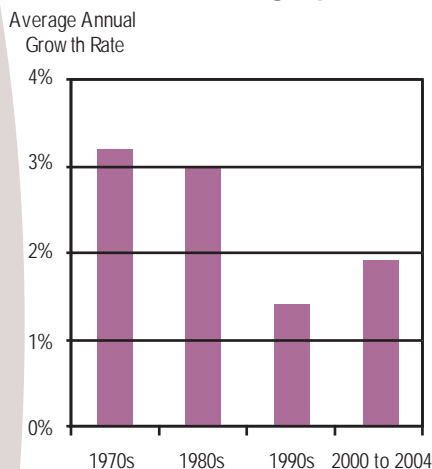
INTRODUCTION

It may not seem like it, but population growth in the San Diego region is slowing down. Figure 1 shows that our growth rates during the 1970s and 1980s were averaging three percent a year or greater. That was almost triple the national growth rate during that time. The source of most of our population growth back then was domestic migration, meaning people moving here from other parts of the state or the nation. This had a lot to do with the relative strength of our local economy as well as the life phase of the baby boomers. During those two decades most boomers were in their 20s and 30s, were willing to move for employment, and many were beginning to have children.

The local economy changed quickly and radically with the advent of the recession in the early 1990s. Annual growth rates plummeted during that decade as people left the region in droves seeking employment elsewhere. Between 1991 and 1996, net domestic migration averaged *minus* 30,000 people each year. Our relatively small growth during those years was primarily from births and foreign immigration, which are much less affected by the state of our local economy.

Our average annual growth rate has picked up since then, but it is still well below what we experienced in the '70s and '80s. Perhaps more significantly, every year since 2000 so far has produced less growth, both in numeric and percentage terms, than the previous year. This is shown in Table 1. (Note that the year 2000 is a nine-month period.) Also of interest in Table 1 is the fact that the region's population passed the 3 million mark sometime during 2003.

Figure 1
Pace of Region's Growth Slowed, But Is Picking Up



Sources: U.S. Census Bureau, California Department of Finance. Compiled by SANDAG, July 2004.

Table 1
Population (2000 to 2004)
San Diego Region

	Population			Total Population Increase	Percent Increase
	Total	Household	Group Quarters ¹		
April 1, 2000	2,813,833	2,716,820	97,013	--	--
January 1, 2001	2,868,873	2,775,909	92,964	55,040 ²	2.0% ²
January 1, 2002	2,924,058	2,822,205	101,853	55,185	1.9%
January 1, 2003	2,976,104	2,870,707	105,397	52,046	1.8%
January 1, 2004	3,017,204	2,916,035	101,169	41,100	1.4%

¹People living in group quarters such as convalescent hospitals, dormitories, boarding houses, detention facilities, and military barracks and ships.

²Nine-month period.

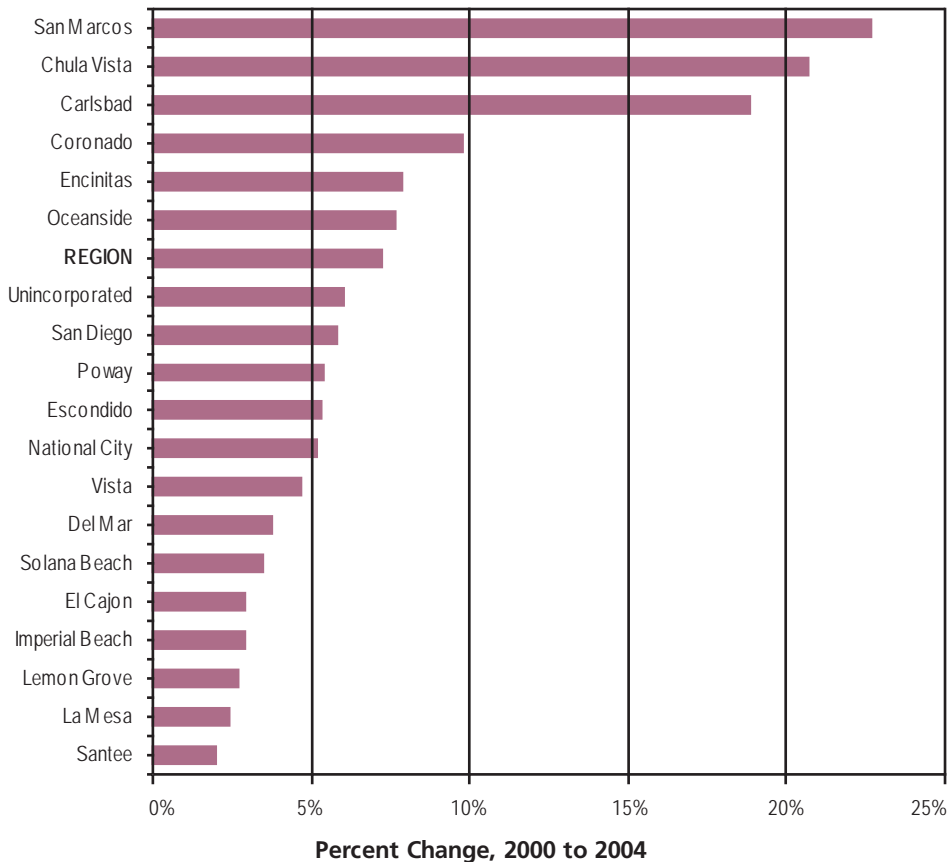
Sources: U.S. Census Bureau, California Department of Finance. Compiled by SANDAG, July 2004.

Table 2
Total Population by Jurisdiction (2000 and 2004)
San Diego Region

Jurisdiction	April 1, 2000	Jan. 1, 2004	2000 - 2004 Change	
			Numeric	Percent
Carlsbad	78,247	92,995	14,748	18.8%
Chula Vista	173,556	209,436	35,880	20.7%
Coronado	24,100	26,459	2,359	9.8%
Del Mar	4,389	4,555	166	3.8%
El Cajon	94,869	97,643	2,774	2.9%
Encinitas	58,014	62,586	4,572	7.9%
Escondido	133,559	140,671	7,112	5.3%
Imperial Beach	26,992	27,779	787	2.9%
La Mesa	54,749	56,050	1,301	2.4%
Lemon Grove	24,918	25,592	674	2.7%
National City	54,260	57,047	2,787	5.1%
Oceanside	161,029	173,307	12,278	7.6%
Poway	48,044	50,632	2,588	5.4%
San Diego	1,223,400	1,294,032	70,632	5.8%
San Marcos	54,977	67,426	12,449	22.6%
Santee	52,975	54,022	1,047	2.0%
Solana Beach	12,979	13,431	452	3.5%
Vista	89,857	94,048	4,191	4.7%
Unincorporated	442,919	469,493	26,574	6.0%
San Diego Region	2,813,833	3,017,204	203,371	7.2%

Sources: U.S. Census Bureau. California Department of Finance. Compiled by SANDAG, July 2004.

Figure 2
Six Jurisdictions Are Growing Faster Than the Region as a Whole



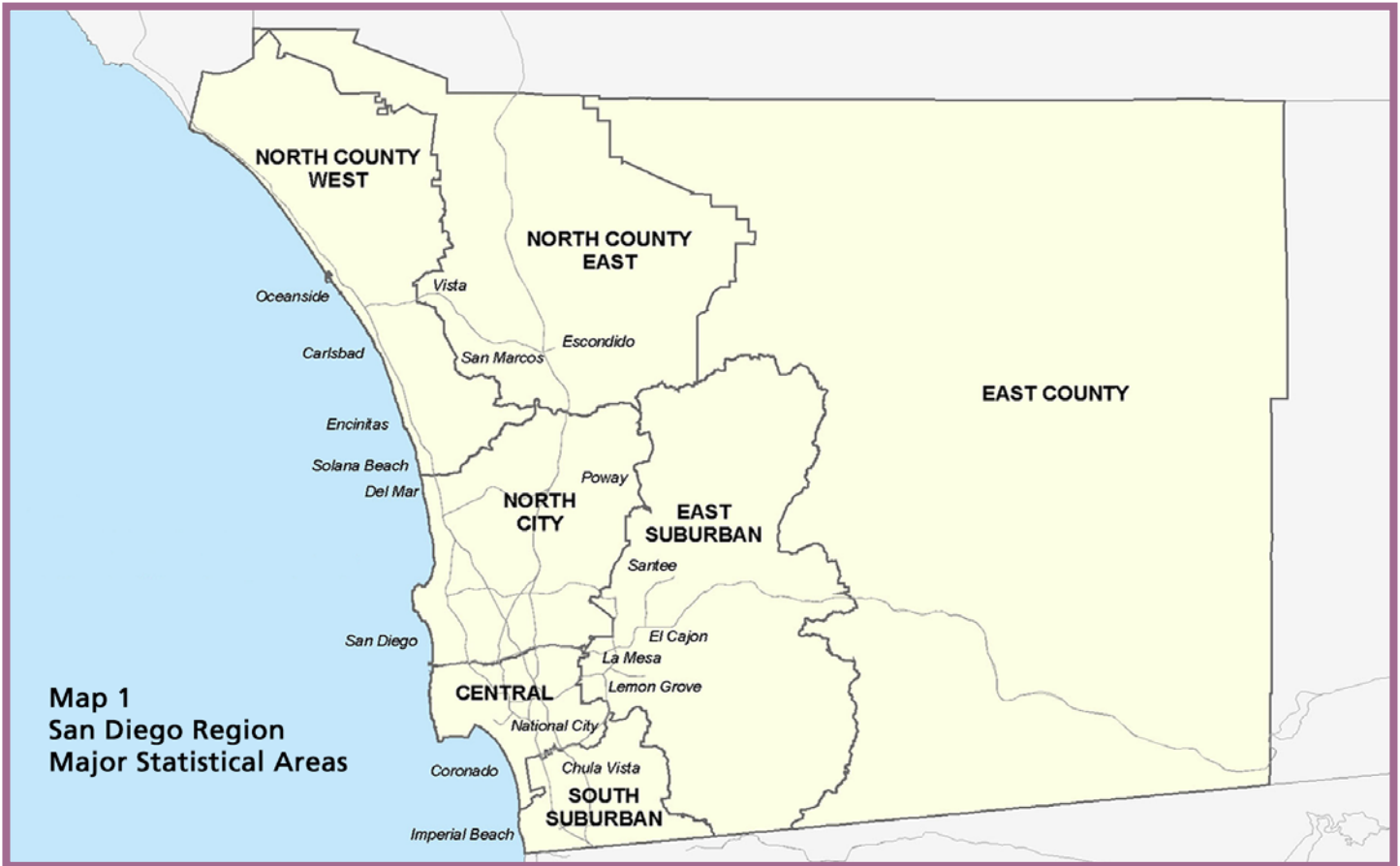
Source: Sources: U.S. Census Bureau, California Department of Finance. Compiled by SANDAG, July 2004.

POPULATION

Table 2 looks at population growth in the 18 cities and the unincorporated area since the 2000 Census. As the largest city in the region, San Diego added the most people during this period, but its growth rate of 5.8 percent was well below the regional figure of 7.2 percent. Chula Vista added about half as many people as San Diego, but that represents a growth rate almost triple that of the region.

Combined, the cities of Carlsbad, Chula Vista, and San Marcos accounted for more than 30 percent of the region's population growth between 2000 and 2004. Figure 2 shows that their growth rates were the highest in the region, and that only six of the 19 jurisdictions grew at a faster pace than the region as a whole. It should be noted that most of the population gain seen in one of those cities, Coronado, was due to changes in military group quarters (barracks and ships) population.

Major Statistical Areas (MSAs) are groups of census tracts that divide the region into the seven subareas seen in Map 1. MSAs are locally-defined geographic areas that have been in place for more than 30 years. Since the boundaries of MSAs have remained stable, they are useful in evaluating change over time. Table 3 provides the 2000 to 2004 population growth for each MSA. Although the North City MSA gained the greatest number of people, the South Suburban MSA experienced the highest growth rate by far. This is mostly due to the continuing large-scale housing construction occurring in eastern Chula Vista.



HOUSING

Tables 4 and 5 present the increases in housing units from 2000 to 2004 by jurisdiction and by MSA. Not surprisingly, the growth patterns are similar to those of population. Coronado and National City are exceptions to this, again due to their large military group quarters (barracks and ships) populations, which do not require housing units.

As with population, the recent increases in housing units are way below what the region experienced in prior decades. Throughout the 1980s, we added an average of almost 23,000 homes each year. In the 1990s, the recession caused a drop to just 9,400 per year. Since the 2000 Census, the region has seen an average increase of about 14,300 units per year.

Since the recession ended, however, an unfortunate trend has continued

**Table 3
Total Population
By Major Statistical Area (MSA) (2000 and 2004)
San Diego Region**

MSA	April 1, 2000	Jan. 1, 2004	2000 - 2004 Change Num.	Pct.
Central	619,133	645,620	26,487	4.3%
North City	658,877	705,555	46,678	7.1%
South Suburban	307,469	351,400	43,931	14.3%
East Suburban	462,663	481,492	18,829	4.1%
North County West	364,157	399,497	35,340	9.7%
North County East	380,430	411,381	30,951	8.1%
East County	21,104	22,259	1,155	5.5%
San Diego Region	2,813,833	3,017,204	203,371	7.2%

Sources: U.S. Census Bureau. SANDAG. January 1, 2004 Population and Housing Estimates. Compiled by SANDAG, July 2004.

to occur: population growth keeps outpacing new home construction. Between April 1, 2000 and January 1, 2004, the region's population increased by 7.2 percent, while new homes grew by only 5.1 percent. Going back to January 1, 1995, the increases are 15.5 percent and 10.1 percent respectively. This ongoing

disparity has contributed to higher housing costs, larger household sizes (persons per household), and increased commuting from Riverside County and Baja California.

The chart on the cover compares the 2000 to 2004 growth rates of both population and housing for

each MSA. The largest numeric gap is seen in the North County East MSA, where population grew by 8.1 percent, but housing units gained only 4.8 percent. In the Central MSA, population increased nearly three times as fast as housing growth. Interestingly, the South Suburban MSA had by far the largest increase in both population and housing during this time period, but was also the most balanced: 15 percent versus 14.8 percent.

About 61 percent of the region's housing stock consists of single family homes, both detached and attached (townhouses). Another 35 percent are multifamily, and the remaining four percent are

Figure 3
The Mix of Housing Types Varies by Jurisdiction (2004)

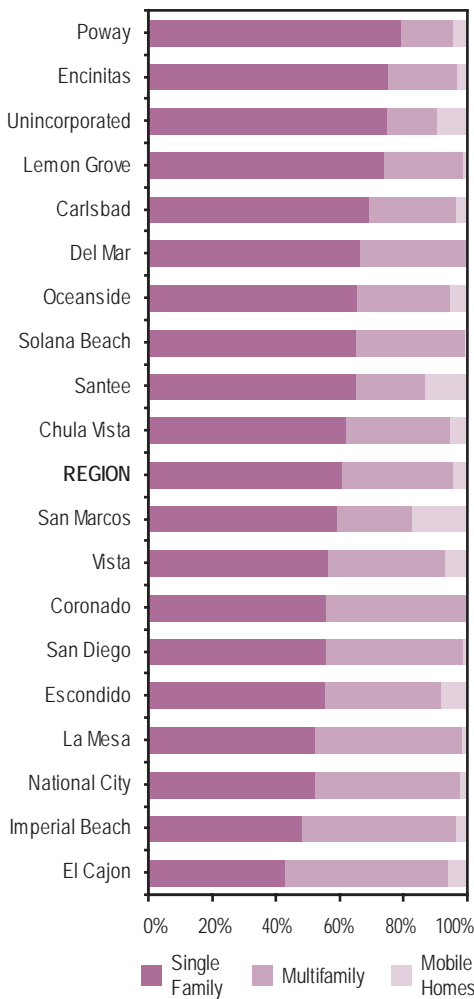


Table 4
Total Housing Units by Jurisdiction (2000 and 2004)
San Diego Region

Jurisdiction	April 1, 2000	Jan. 1, 2004	2000 - 2004 Change Num.	Change Pct.
Carlsbad	33,798	39,308	5,510	16.3%
Chula Vista	59,495	71,844	12,349	20.8%
Coronado	9,494	9,525	31	0.3%
Del Mar	2,557	2,575	18	0.7%
El Cajon	35,190	35,414	224	0.6%
Encinitas	23,843	24,901	1,058	4.4%
Escondido	45,050	46,155	1,105	2.5%
Imperial Beach	9,739	9,784	45	0.5%
La Mesa	24,943	24,987	44	0.2%
Lemon Grove	8,722	8,765	43	0.5%
National City	15,422	15,473	51	0.3%
Oceanside	59,581	62,557	2,976	5.0%
Poway	15,714	16,352	638	4.1%
San Diego	469,689	489,005	19,316	4.1%
San Marcos	18,862	21,601	2,739	14.5%
Santee	18,833	18,871	38	0.2%
Solana Beach	6,456	6,494	38	0.6%
Vista	29,814	30,249	435	1.5%
Unincorporated	152,947	159,743	6,796	4.4%
San Diego Region	1,040,149	1,093,603	53,454	5.1%

Sources: U.S. Census Bureau, California Department of Finance. Compiled by SANDAG, July 2004.

Table 5
Total Housing Units By Major Statistical Area (MSA) (2000 and 2004)
San Diego Region

MSA	April 1, 2000	Jan. 1, 2004	2000-2004 Change Num.	Change Pct.
Central	225,305	228,958	3,653	1.6%
North City	268,099	283,516	15,417	5.8%
South Suburban	97,098	111,508	14,410	14.8%
East Suburban	170,370	173,693	3,323	2.0%
North County West	136,488	146,548	10,060	7.4%
North County East	131,101	137,406	6,305	4.8%
East County	11,688	11,974	286	2.4%
San Diego Region	1,040,149	1,093,603	53,454	5.1%

Sources: U.S. Census Bureau. 2000 Census. SANDAG. January 1, 2004 Population and Housing Estimates. Compiled by SANDAG, July 2004.



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SANDAG Member Agencies:

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- El Cajon
- Encinitas
- Escondido
- Imperial Beach
- La Mesa
- Lemon Grove
- National City
- Oceanside
- Poway
- San Diego
- San Marcos
- Santee
- Solana Beach
- Vista
- County of San Diego

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- Imperial County, Caltrans, Metropolitan Transit System, North San Diego County Transit Development Board, U.S. Department of Defense, San Diego Unified Port District, San Diego County Water Authority, Baja California/Mexico

SANDAG, in conjunction with local jurisdictions and the California Department of Finance, has prepared annual population and housing estimates for nearly 30 years. We also prepare estimates of selected demographic and economic characteristics of the population, including age, gender, ethnicity, and household income. January 1, 2004 population and housing estimates are the focus of this report. Future **infos** will present the characteristics estimates.

In addition to preparing annual estimates of the region's demographic and economic characteristics, we maintain information from the census, land use inventories, transportation studies, and more. This information can be downloaded directly from the Demographics and Other Data section of our Web site (www.sandag.org) in two formats. The Data Warehouse allows users to select specific census, estimates, and forecast variables and create custom datasets as text files or an Excel spreadsheet. The Profile Warehouse contains formatted profiles of the most frequently requested information.

Customized data, reports, and maps also are available through SourcePoint, a nonprofit corporation chartered by SANDAG. For information on these and other SourcePoint services, call (619) 699-1900.

mostly mobile homes. For most of the 1990s, the region saw very few multifamily units built. The two primary reasons for this were fear of construction defect litigation and local opposition to multifamily structures. Since 2000, however, multifamily construction has picked up, and about 36 percent of the 53,500 homes built in the region since the 2000 Census are multifamily (up from 21% during the 1990s).

Figure 3 describes the current housing stock mix for the 19 jurisdictions and the region as a whole, sorted by percent of single family homes. More than 70 percent of the homes in Poway, Encinitas, the unincorporated area, and Lemon Grove are single family structures. In Imperial Beach and El Cajon, less than half are. Mobile homes comprise 17 percent of the housing stock in San Marcos, and 13 percent in Santee. However, in numeric terms that translates to just 3,700 and 2,500 units respectively. The jurisdiction with the largest

number of mobile homes is the unincorporated area, with more than 15,000.

METHODOLOGY CHANGE

Historically, SANDAG has used the California Department of Finance (DOF) annual January 1 population and housing unit estimates as control totals for our estimates at all geographic levels. DOF population estimates continue to be used. For housing, however, our own estimates have proven to be more accurate. This is because each year the 19 local jurisdictions provide SANDAG with specific, address-level housing unit completion information. Most jurisdictions also send these data to DOF, but DOF's internal schedule requires that jurisdictions send the information in January or February for the previous calendar year. In some cases, the local housing completion information is not complete until later in the year, when it is sent to SANDAG.