



## Introduction

### Background

The San Diego region is home to the largest concentration of military assets in the world, supporting a robust ecosystem of over 140,000 active duty military personnel and civilian employees, 241,000 veterans and retirees, and generating significant economic impact for the region. This defense cluster represents one of every five jobs in the region and 20 percent of San Diego's gross regional product.<sup>1</sup>

The breadth of the military presence in San Diego extends beyond facility boundaries; military families are inextricably intertwined with residential, educational, and other core communities throughout the region.

With continuous yearly growth and the Navy's plan to homeport 15,000 additional sailors in the San Diego region by 2025<sup>2</sup>, traffic congestion surrounding military activities is projected to increase. Military-related traffic congestion impacts the demand on the regional and local transportation network; contributes to the region's greenhouse gas (GHG) emissions; and affects the military's ability to move goods, equipment, and personnel that are essential to national security. Thus, it is necessary for the region to study and implement sustainable transportation options for military personnel and civilian employees to address regional and local traffic congestion and achieve regional GHG reduction goals.

The San Diego Association of Governments (SANDAG) is the region's Metropolitan Planning Organization and Regional Transportation Planning Agency. As such, SANDAG is uniquely positioned to bring together decision-makers from all areas of the region including public transportation agencies, local jurisdictions, and military facilities to make informed decisions while planning for the region's future. It is important to coordinate planning efforts with decision-makers from all areas of the region to ensure a regional framework that promotes a prosperous economy, an efficient transportation system, and thriving communities. Through joint, cooperative military and community planning, growth conflicts can be planned for and mitigated.

In 2015, the SANDAG Board of Directors adopted *San Diego Forward: The Regional Plan* (Regional Plan), which charts a course to lower GHG emissions through focused land use planning and investments in transportation improvements that provide workers and residents with travel choices. Preparation of the Regional Military Multimodal Access Strategy (Strategy) is a near-term action identified in the Regional Plan to enhance planned regional transportation investments with supporting regional and local projects, operational improvements, and programs that facilitate access to the region's diverse and dispersed military facilities for the benefit of all the region's residents.



Image Credit: SDMAC 2018 Military Impact Study

### Regional Military Multimodal Access Strategy

As part of the Strategy, the Briefing Book synthesizes existing conditions of land use, transportation, and travel data for the purpose of:

- Sharing information on the current dynamics of the military in the region
- Providing stakeholder perspectives on military access and mobility
- Providing data to make informed decisions

Through extensive research and stakeholder interviews, the Briefing Book documents:

- Existing military partnerships

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- Commuting patterns of military and civilian personnel
- Existing transportation options within the vicinity of regional military installations
- Challenges affecting mobility as it relates to regional military installations

The information provided will be used to develop the final Strategy document, which will identify key multimodal transportation projects and programs that will improve mobility for military facilities while meeting regional, state, and federal goals.

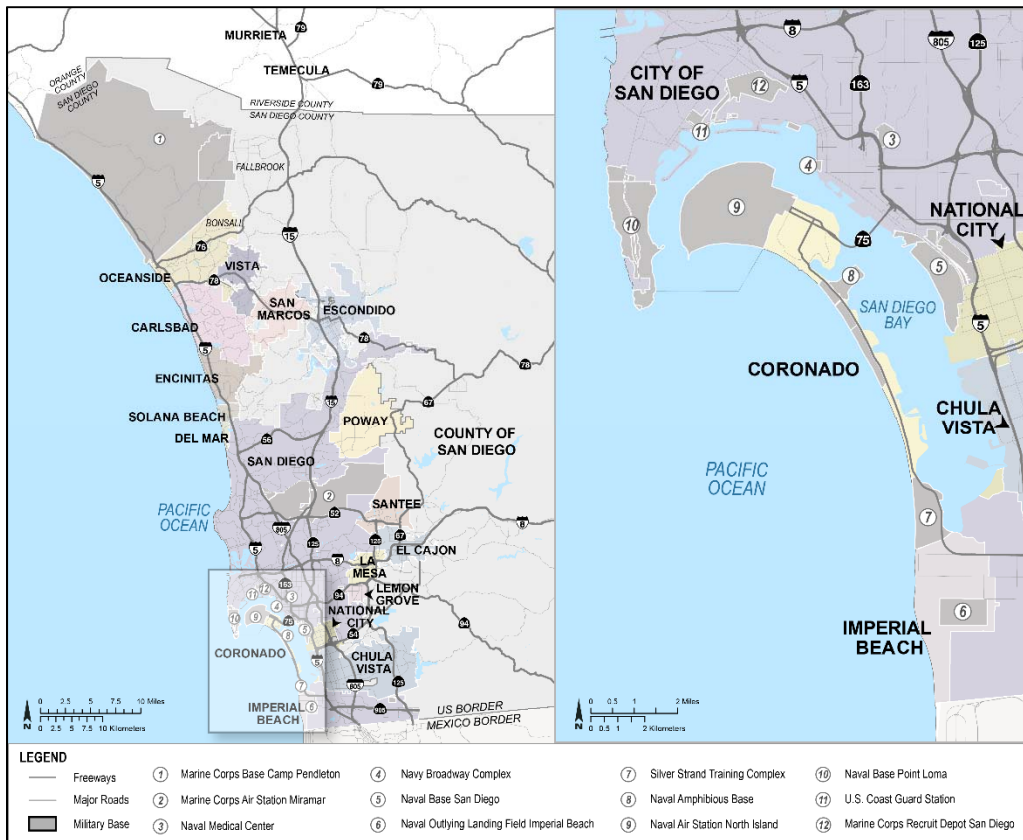
## Project Area

The project area of the Strategy is the entire San Diego region, including 18 cities, unincorporated areas of the County of San Diego, and several military facilities (*Table 1* and *Figure 1*).

*Table 1. Military installations in the San Diego Region*

Military Installations
Marine Corps Base Camp Pendleton (Camp Pendleton)
Marine Corps Air Station Miramar (Miramar)
Marine Corps Recruit Depot San Diego (MCRD)
Naval Base Coronado (NBC)
Naval Base Point Loma (NBPL)
U.S. Coast Guard
Naval Base San Diego (NBSD)

*Figure 1. Project Area*





## Funding

Each military installation develops budget priorities through a Planning, Programming, Budgeting and Execution (PPBE) process to identify military construction priorities (MILCON). Through congressional authorization and appropriations, a portion of these identified priorities are funded. Chapter 169 of Title 10, United States Code, contains most of the laws governing military construction matters and specifies requirements for project authorization. Congress requires project-by-project authorization and appropriation for military construction projects.

State and local agencies are responsible for developing and maintaining public roads to meet normal defense needs in areas adjacent to military bases. Due to the unique jurisdictional boundaries and associated funding constraints, partnerships for projects supporting both military installations and local jurisdictions can be challenging. Under certain conditions, the Defense Access Road (DAR) Program provides a means for the Department of Defense to pay its share for public highway improvements resulting from sudden or unusual defense-generated impacts. Eligibility for this program includes: 1) Defense doubling of traffic, 2) new connections to military installations, 3) low-type roads that need to accommodate heavy/oversized vehicles, and 4) replacement roads for those closed due to military necessity. This program is not a funding program—it is a mechanism to transfer MILCON appropriations through the treasury to FHWA so local jurisdictions can use those funds to plan, design and construct projects outside of military installations.

### *Expanding Access with the DAR Program*

Silver Strand Training Complex which is part of Naval Base Coronado used the DAR program to assist with funding a new gate along State Route 75.





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Due to the increasing needs for military priority projects and the limited funding appropriated by Congress, military installations are looking for unique ways to maximize budgets by partnering with local jurisdictions to support military needs through Joint Agency Intergovernmental Service Agreements to support operations and maintenance needs. There also are innovative ways the military has been able to leverage existing military assets through public-private partnerships for development.

## *"Leveraging Existing Military Assets to Support San Diego Economy and Military Goals"*

The Manchester Financial Group is redeveloping 3 million square feet of waterfront property that has been occupied by the Navy for almost 100 years. The \$1.3 billion mixed-use plan replaces the existing Navy Broadway Complex and leverages 12 acres of public land. The new development includes a 372,000 square foot Navy Region Southwest headquarters, office towers, a hotel, retail space, and a museum. Under the terms of a 99-year lease with the United States government, Manchester Financial Group is building a new 17-story Class A office building for the U.S. Navy Region Southwest headquarters in exchange for development rights. This project estimates \$12 million per year of Transient Occupancy Tax revenue, \$10 million a year of property tax to the County of San Diego, \$15 million a year in sales tax, and more than \$14 million in Development Impact Fees. The new U.S. Navy Region Southwest headquarters will lose a significant number of parking spaces from its original capacity, and although not required on federal projects, it will abide by city code for this new development and encourage utilization of alternative transportation options in Downtown San Diego.

### 15 Acres Navy Land

#### Developer:

- 12.5 Acres on 99 Year Lease
- 1.3 MSF Office
- 1.2 MSF Hotel
- 25 KSF Retail

#### Navy:

- 2.5 Acres
- 17 Story, 373,000 SF Headquarters





## Regional Framework

### Military Collaboration

Given the significant military presence in the San Diego region and anticipated growth, collaboration between SANDAG, local jurisdictions, and the public agencies that influence regional transportation planning, including the California Department of Transportation (Caltrans), North County Transit District (NCTD), and San Diego Metropolitan Transit System (MTS) and the military is key to a regional transportation system that provides connectivity, enhances mobility, and fosters a high quality of life for all.

### SANDAG

As both the Metropolitan Planning Organization and Regional Transportation Planning Agency for the San Diego region, SANDAG is responsible for planning the regional transportation network of highways, public transit, and regional bikeway projects as well as funding allocation, project development, and eventually construction of transit and bikeway projects in the San Diego region, in addition to its ongoing transportation responsibilities and other regional roles. SANDAG builds consensus; makes strategic plans; obtains and allocates resources; plans, engineers, and builds public transportation, and provides information on a broad range of topics pertinent to the region's quality of life. SANDAG is governed by a Board of Directors composed of mayors, councilmembers, and county supervisors from each of the region's 19 local governments. Supplementing these voting members are advisory representatives from Imperial County, the U.S. Department of Defense, Caltrans, San Diego Unified Port District, Metropolitan Transit System (MTS), North County Transit District (NCTD), San Diego County Water Authority, Southern California Tribal Chairmen's Association, and Mexico. In January 2019, the Airport Authority will serve as an advisory member of the SANDAG Board of Directors.

Every four years, SANDAG develops and updates San Diego Forward: The Regional Plan. The Regional Plan is a federally- and state-mandated document that establishes the vision for how the San Diego region will grow, including all transportation-related investments that are needed to support that vision. The Regional Plan outlines projects for transit services, Express or Managed Lanes, highways, local streets, and active transportation throughout the region. The development of the Regional Plan and the document itself becomes very impactful for the region as it identifies the projects to be implemented and begins plans for funding these projects.

### Local City Jurisdictions and the County of San Diego

The SANDAG Board of Directors includes representation of the local city jurisdictions and the County of San Diego. Each city is governed by its individual city councils, and the local jurisdictions are responsible for overseeing and delivering transportation improvement projects to city residents. The County of San Diego is governed by a Board of Supervisors, and the County oversees and provides transportation improvement projects to residents outside of city incorporated areas.

### Caltrans

The California Department of Transportation (Caltrans) is a statewide government department overseen by a State Transportation Agency and organized into 12 districts. Caltrans is responsible for operations, maintenance, design, construction, and long-range planning of the state highway system. Caltrans manages more than 50,000 miles of highway and freeway lanes; supports public transportation, including Amtrak inter-city rail services; and coordinates with local agencies on transportation planning among other activities.

Caltrans District 11 (District 11) is responsible for San Diego and Imperial counties and manages roughly 1,000 miles of urban and rural freeways. Among its many activities, Caltrans performs long-range transportation planning (known as System Planning) which involves evaluating and recommending improvements to the state highway system. District 11 has completed Corridor System Management Plans (CSMP) for the North Coast Corridor on Interstate 5 (I-5) as well as for I-15 and I-805. A CSMP includes a listing and phasing plan of recommended operational improvements, ITS strategies, and system expansion projects to preserve or improve performance measures within the corridor.

District 11 also has an active leadership role in freight and international border planning activities. Trucking, air cargo airports, rail lines, and seaports play a significant role in freight planning. District 11 is an active participant in the California Freight Advisory Committee (CFAC). The CFAC produced a California Freight Mobility Plan that outlines strategies to maintain and enhance existing assets, apply new

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technologies and system operations practices, address negative impacts of freight movement, add new capacity, strengthen the collaborative approach to freight planning, and create dedicated, reliable, long-term freight funding programs. The California Freight Mobility Plan also includes a project list for improving the freight network.

District 11 also is committed to advocating for the accommodation of all users of the State Highway System, with an emphasis on non-motorized modes of transportation from the early project planning and development phase through construction and maintenance. The District's active transportation staff work with regional, and local agency staff to provide appropriate accommodation for bicyclists and pedestrians in and around Caltrans facilities, as well as facilitating and securing funding for state, local and regional non-motorized modal projects. Bicycling and walking are both viable forms of transportation and excellent forms of exercise that help reduce your carbon footprint while lowering the number of single-occupant vehicles on the roadway. It is the goal of Caltrans to fully consider the needs of non-motorized travelers in all programming, planning, maintenance, construction, operations, and project development activities and products as supported by Caltrans' Deputy Directive 64-R-1.

Caltrans awarded a Strategic Partnerships Planning Grant to support developing a Military Multimodal Access Strategy in the San Diego region. As the top defense state in the country with over 30 military installations, California is a strategic gateway to Asia and the Pacific. The results of this study will be shared with the Governor's Military Council and Office of Planning and Research to serve as a model for other military communities.

### Transit Operators

There is an inherent overlap of some of the responsibilities between SANDAG and the transit agencies in conducting transit service planning and development project planning; therefore, all planning responsibilities are conducted with coordination and consultation between SANDAG and the transit agencies.

There are two transit operators in the San Diego region: Metropolitan Transit System (MTS) and North County Transit District (NCTD). MTS serves the urbanized areas of the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, Santee, and San Diego, as well as rural areas in East San Diego County. NCTD serves the urbanized areas of the cities of Carlsbad, Encinitas, Escondido, Oceanside, San Marcos, and Vista, as well as the rural communities of Bonsall, Fallbrook, Ramona, and Valley Center in North San Diego County.

As part of their operations, MTS and NCTD are responsible for the service planning, scheduling, and performance monitoring of their respective transit services. Service adjustments occur three times per year for MTS and twice a year for NCTD or on an as-needed basis to improve efficiency and customer service. Information on transit services operating adjacent to or directly serving military facilities is included in each military installation profile as it applies.

### Port of San Diego and San Diego Airport Authority

The San Diego Unified Port District (Port of San Diego) was formed in 1962, originally including both the airport and seaport authorities. In 2002, the San Diego Airport Authority was created and assumed jurisdiction over the airport.<sup>3</sup> Currently, the Port of San Diego manages the San Diego Bay and its 34 miles of waterfront for its member cities - Chula Vista, Coronado, Imperial Beach, National City and San Diego. The Port of San Diego oversees 2 maritime cargo terminals, 2 cruise ship terminals, 22 public parks, the Harbor Police Department and the leases of hundreds of tenant and subtenant businesses around San Diego Bay. The San Diego Airport Authority has land use planning authority and jurisdiction over lands within the original San Diego International Leasehold and serves as the Airport Land Use Commission for the County of San Diego. Ongoing operation and development of both the San Diego International Airport and Port of San Diego are key components to the regional transportation system, and both entities actively collaborate with SANDAG and its member agencies to address impacts to local and regional transportation infrastructure.

### Military Working Group

SANDAG created a framework to help facilitate discussion and collaboration between the military, local jurisdictions, and transportation through a Memorandum of Agreement (MOA) between the U.S. Department of Defense (DoD) and the SANDAG Board of Directors (see [Appendix A](#)). The MOA assures a cooperative and mutually beneficial working relationship and includes the addition of an DOD advisory position on the SANDAG Board of Directors to provide input on issues of mutual interest, including transportation, regional growth,

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housing, open space, water, energy, and other topics. The MOA was updated in 1986 and again in 2017 to reflect the formation of the San Diego Regional Military Working Group (MWG) and changing conditions in the region.

Given continued military growth and influence in the region, the SANDAG Regional Planning Committee formed the MWG in 2013. The MWG includes representatives from all military branches with installations in the region, adjacent local jurisdictions, as well as SANDAG and the Port of San Diego (*Table 2*). The MWG allows for these stakeholders to coordinate programs, address issues of mutual concern, and determine the best ways in which the military can support prosperity and the region can support the effective operations of the military. The MWG also provides input on SANDAG projects as they relate to the local and military community.

## Growth

Today, the region is home to more than 3.2 million people, most of whom live in the region's 18 incorporated cities. Projected growth of the general population and the military population will have large impacts on the regional transportation network.

## Forecasted Regional Growth

The SANDAG Regional Growth Forecast, adopted by the SANDAG Board of Directors in 2013, projects the region's population will grow by nearly a million people by 2050<sup>4</sup> (see *Appendix B*). This growth will lead to approximately 460,000 more jobs and over 325,000 more housing units by 2050. To accommodate this growth, SANDAG is planning for infill development and intensification of existing land uses within urban communities and along key transportation corridors. The Regional Plan envisions the region will create more compact communities in the western third of the San Diego region, which is where military installations are located.

## Military Growth

The military community in the region is growing and is projected to continue to grow based on national defense policies and plans. The total number of active duty personnel and civilians employed by the military has increased by about 5% from 2016 to 2018 (*Table 3*).

*Table 2. Military Working Group Members*

Military Installations
Marine Corps Installation West
Navy Region Southwest
Navy Facilities Engineering Command
Marine Corps Recruitment Depot
U.S. Coast Guard San Diego Sector
City of Oceanside
City of San Diego
City of Coronado
City of National City
City of Imperial Beach
County of San Diego
Port of San Diego
SANDAG

*Table 3. Number of military personnel for each military branch in the region, FY2016-2018*

Military Branch	2016	2017	2018	Percent Change (2016-2018)
Navy	55,239	55,657	60,777	10%
Marines	51,556	51,866	51,967	1%
Department of Defense Civilians	21,549	20,353	20,280	-6%
Department of Defense Reserves	6,278	7,500	7,725	23%
Coast Guard	717	717	717	0%
<b>TOTAL</b>	<b>135,339</b>	<b>136,093</b>	<b>141,466</b>	<b>5%</b>

U.S. DoD is increasing the military workforce in the San Diego region as a part of its "Rebalance to Pacific" military strategy. This national defense strategy focuses on expanding and intensifying U.S. military presence in the Asia-Pacific region by moving forces, including ships,



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from the Atlantic to the Pacific. The region's extensive military assets play an important part in executing this strategy due to their locations, extensive training and operation facilities, and the large number of military personnel already based in the San Diego region. Today, one out of every six sailors and one out of every four marines in the nation are stationed in San Diego<sup>5</sup>.

As a result of "Rebalance to the Pacific," the region's military sector and related industries such as shipbuilding will experience significant growth. By 2025, the U.S. Navy has plans to add 20 ships and 15,000 sailors (plus their families) to the region<sup>6</sup>. The region's shipbuilding and repair contractors will increase to support the demand for new ships in addition to upgrading older vessels and performing ongoing maintenance of an expanding West Coast ship fleet.

The growing military workforce is a critical part of how the region will develop. With the increase in military and civilian population, it is important to develop and implement sustainable transportation options that prepare the regional transportation network for the forecasted growth. If more sustainable transportation infrastructure projects and programs are not implemented, the transportation network as it exists today will be unable to meet the future demand of the military and region. To understand the current constraints on the transportation network and challenges facing access to military facilities, the existing commuting patterns and gate access for the military facilities are discussed in Part II of this report.

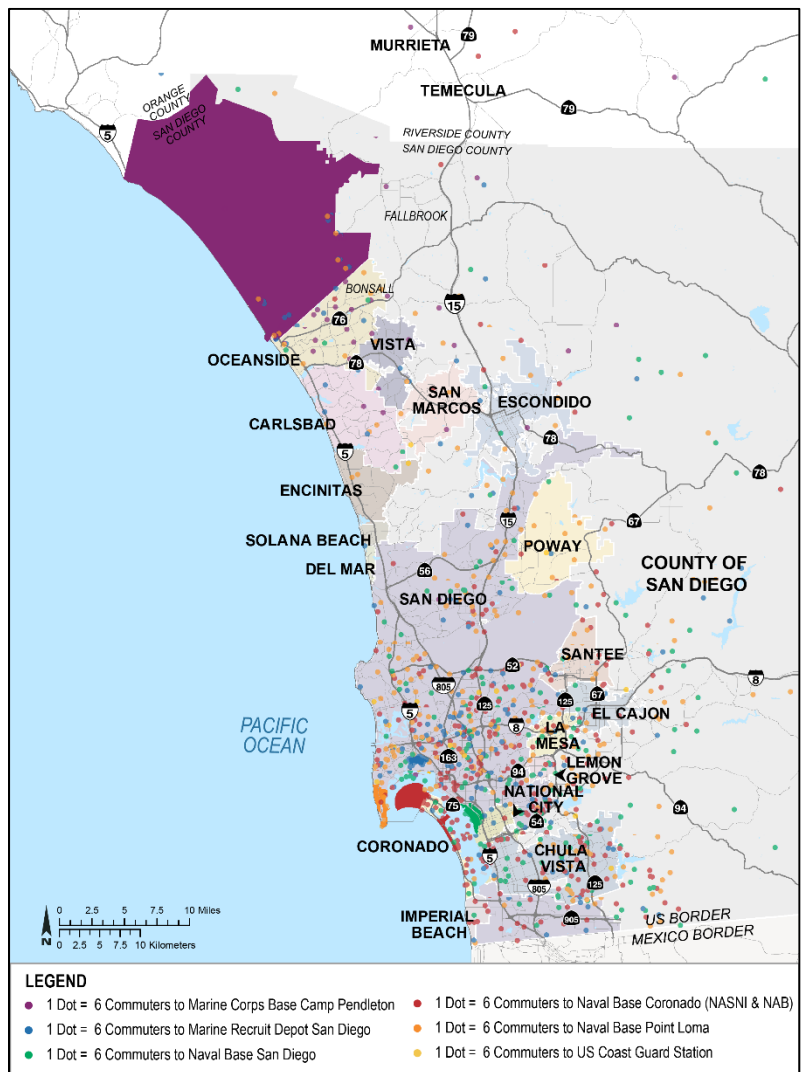
### Housing

A robust supply chain of federal employees, military personnel, military families, civilian employees, private contractors, and veterans make up the San Diego "mega military cluster".<sup>6</sup> Military personnel, including contractors, may have temporary or short-term commitments (such as training or shore duty) or long-term commitments. Short and long-term commitments affect the region's economy and transportation network as it causes variances in the military population within the region at any given time and the goods, services, and jobs that come with it.

Understanding the commuting patterns of the region's military community is key to evaluating and understanding the existing regional travel demand. Commuting patterns are influenced by various factors including housing, parking availability, cost, travel time, and available mobility options. Military personnel, their families, and contractors reside throughout the region and outside the region. Housing options include on-base housing varying from barracks to ships in port, off-base military housing, or other housing options in local jurisdictions. Based on iCommute Commuter Survey data, a large number of military personnel live in jurisdictions in East and South San Diego County, and in Riverside and Orange counties (Figure 2).

DoD policy outlines that the local housing market needs to support military housing needs within adjacent communities, and the San Diego region housing supply is not keeping pace with the demands of increasing military personnel in the region. Although on-base housing is available aboard ships or in the military barracks for lower-ranking military personnel, basic housing allowance permits higher ranking personnel and their families to live within the adjacent communities. There is

Figure 2. Military Personnel Origin





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military family housing on some bases, but military housing needs are supported throughout the local communities. High housing costs are not only a constraint for military personnel but also are a challenge for employee retention for private contractors. Off-base military housing is available, but most is located throughout the county and still requires commute trips to each military installation.

### *“Challenges to Housing Enlisted Personnel”*

In 2009, Naval Base San Diego built Pacific Beacon, large-scale, privatized luxury on-base housing for unaccompanied senior ranking sailors. The project struggled because its target market preferred to live off base. This was compounded by turnover caused by frequent deployments, completed enlistments, and transfers. The Navy began leasing to junior sailors, but their lower salaries were a barrier to the higher rent. Pacific Beacon is part of the Navy’s “Homeport Ashore” effort to house fewer junior sailors in uncomfortable conditions on ships.



### *City of National City Downtown Specific Plan*

Due to the close proximity of Downtown National City to Naval Base San Diego, there is an opportunity for future development to accommodate housing needs within walking and biking distance of Naval Base San Diego and encourage the supporting tax base to stay in the National City community. The City of National City Downtown Specific Plan highlights objectives to support a substantial increase of Navy personnel that live and shop in downtown. Plans include the creation of micro-units to support the single sailor housing needs and plans for alternative transportation modes to support mobility, such as Neighborhood Electric Vehicles and scheduled shuttle systems. Including housing considerations within walking distance of military facilities can encourage shorter, multi-modal commutes that also support climate action plan goals and economic development for local jurisdictions.



NEV stop with shelter

Photo Credit: City of National City “Downtown Specific Plan” (2017)

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## SANDAG and iCommute

SANDAG's Transportation Demand Management (TDM) program, iCommute, liaisons with military commanders to help educate the military community on alternative commute options. The goal of the iCommute program is to reduce traffic congestion in order to cut greenhouse gas emissions and other environmental pollutants that result from driving alone. The iCommute website allows commuters to compare multiple transportation choices such as carpool, vanpool, transit, biking, telework, and shared mobility. iCommute also provides several assistance programs to employers in the region including Employer Services, Vanpool subsidy, Guaranteed Ride Home, Bike Encouragement, and iCommute partnerships (*Table 4*).

*Table 4. Number of military personnel for each military branch in the region, FY2016-2018*

Service	Description
<b>Employer Services Program</b>	Assists local businesses with developing and implementing customized employee commuter benefit programs that lower costs, increase productivity, and help the environment.
<b>Vanpool Program</b>	Provides commuter groups of five or more with a subsidy of up to \$400 a month to offset the cost of a vehicle lease, which comes with insurance and maintenance. Members of the military and federal employees can also receive up to \$260 per month for vanpool costs.
<b>Guaranteed Ride Home</b>	Offers a safety net for commuters who carpool, vanpool, take transit, walk, or bike to work by providing a free ride home up to three times per year in the event of a family emergency or illness, unscheduled overtime, or being stranded at work due to carpool or vanpool driver leaving for an emergency.
<b>Bike Encouragement Program</b>	Supports the regional bike network and facilitates bike commuting by hosting Bike to Work Day events, funding mini-grants in support of Bike Month events, offering complimentary employer bike services, and producing the San Diego Regional Bike Map.
<b>iCommute Partnership Program</b>	Provides partners with a wide range of marketing benefits and exposure to regional decision makers, employers, the public, and iCommute participants in return for cash donations, in-kind contributions that have an equivalent cash value, or a combination of both.

iCommute performs commuter surveys with several military facilities in the region to learn how military personnel and civilian employees currently commute to work, what alternative transportation options they are aware of, and which of these options they would be willing to switch to as opposed to driving alone. Using this information, iCommute develops direct marketing initiatives to promote and raise awareness of alternative commute options among military and civilian personnel. Feedback from this survey also provides origin-destination feedback which provides a high-level understanding of employee commute distances.

In 2018, iCommute partnered with the Navy and the Marine Corps on the launch of the "Military Carpool Incentive Pilot" to provide free Waze Carpool rides to and from each base for one month. The program aims to reduce congestion by providing an additional commute option for employees and subsidizing driver commute costs for those willing to share the ride. Waze Carpool participants are also eligible to use regional infrastructure including Park & Ride lots, Express Lanes and carpool lanes.

Eligible military employees can save up to \$260 per month as part of the Transportation Incentive Program (TIP) which is a federally subsidized benefit that covers vanpools and transit systems, including the bus, Trolley, COASTER, and SPRINTER. With the combined Transportation Incentive Program (TIP) benefit and up to \$400 vanpool subsidy, a vanpool or transit commute is essentially little or no cost for eligible military employees<sup>7</sup>. Additionally, several military installations have reserved spaces for carpool and vanpool vehicles.

iCommute provides resources to shared mobility programs in the region, including bikeshare, shared electric scooters, carshare and on-demand ridesharing. Some of these programs are only available in the local jurisdiction adjacent to each military installation; however, ongoing collaboration efforts have encouraged several pilot projects to allow access to these shared mobility programs.

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In 2018, SANDAG sponsored Senate Bill 1151, which was signed into law and will enable San Diego County or any city in the county to establish a Neighborhood Electric Vehicle (NEV) Transportation Plan to serve the transportation needs of its residents, while supporting a sustainable and healthy region. NEVs are low speed, motorized vehicles that have four wheels, and can reach speeds up to 25 mph. These vehicles can be used in neighborhoods for local trips and could help cities reach Climate Action Plan goals by giving residents zero emission transportation options.

Free Rides Everywhere Downtown (FRED) is a free shuttle service supported by a partnership between the City of San Diego, Civic San Diego, and the Downtown San Diego Partnership that serves Downtown San Diego. FRED uses NEVs that riders can access via a mobile app, The Free Ride, and ride within the service area weekdays during 12-14 hour timeframes. The service boundary includes North Harbor Drive adjacent to the U.S. Coast Guard Station and extends into Downtown San Diego, providing connections to destinations in Downtown, East Village, and Little Italy. There are a limited number of drivers and electric vehicles for this program, which impacts demand at peak hours.



## Regional Summary of Challenges

### Funding

- Congress requires project-by-project authorization and appropriation for military construction projects
- Regional Military Construction (MILCON) funds focus on items that are mission essential
- Annual budget for bases primarily fund small maintenance projects
- State and local agencies are responsible for developing and maintaining public roads to meet normal defense needs in areas adjacent to military bases
- Due to the unique jurisdictional boundaries and funding constraints associated, partnerships for projects supporting both military installations and local jurisdictions can be challenging
- Funding for more security guards to be stationed at gates is constrained

### Mobility and Housing

- By 2025, the U.S. Navy plans to significantly increase its population for military and supporting contractor needs
- The San Diego region housing supply and transportation network is not keeping pace with the demands of increasing military personnel in the region
- There is high demand and limited supply of affordable housing in the San Diego region, particularly in coastal areas near military facilities
- Military personnel also can no longer seek housing options south of the U.S. – Mexico border
- While the DoD offers a Basic Allowance for Housing (BAH) to address some of the region's higher housing costs, many military personnel find that it is insufficient
- High housing costs also are a constraint for private defense companies attempting to attract or retain employees
- Military employees have varying work schedules which makes it difficult to use schedule-based mobility options like transit and carpool/vanpool
- Most military employees can afford a car and parking is available, making the option for driving very attractive
- Only transit and vanpool qualify for the Transportation Incentive Programs (TIPS), making it difficult to encourage other alternative commutes like Carpool or On-Demand Rideshare
- Some members of the military commute from residences outside the region, including Orange and Riverside counties
- The DoD discourages using ships as housing options
- Military personnel have access to the base under general military rules and regulations while contractors have different rights, rules and regulations making mobility programs difficult to coordinate
- Helmets are required on-base for people riding bikes, which may deter people from biking
- Limited shared government cars available on bases
- Cultural bias from employees assuming that transit is considered less comfortable and safe

### Planning and Collaboration

- Due to security concerns or dynamic local threat levels, projecting growth can be difficult to align with the regional forecasting process
- There is no military representation on the Board of Directors of the local transit agencies
- There are no longer Employee Transportation Coordinators assigned to each military facility, making it difficult for iCommute to coordinate and filter updated Transportation Demand Management information throughout each base
- The San Diego Airport Authority is not a member of the Military Working Group
- Varying work schedules make marketing pilot projects difficult
- The framework of military contracts, which require a competitive bidding process, can be a barrier to partnering with the private sector for streamlined pilot programs
- Local jurisdictions have climate action plans but can only take credit for trips that originate or end in their jurisdictions; they cannot receive credit for improvements that mitigate or address traffic that is passing through





## References

iCommute has completed the following military related commuter survey reports:

- Naval Base Coronado (October 2015)
- Naval Base San Diego (June 2016)
- Continental Maritime Of San Diego (September 2016)
- U.S. Coast Guard (January 2017)
- BAE Systems (February 2017)
- Naval Base Point Loma (January 2018)

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<sup>1</sup> <http://www.sandiegobusiness.org/our-economy/defense>

<sup>2</sup> The San Diego Military Advisory Council (SDMAC) Military Economic Impact Study (2018)

<sup>3</sup> [http://www.leginfo.ca.gov/pub/01-02/bill/asm/ab\\_0051-0100/ab\\_93\\_bill\\_20011014\\_chaptered.html](http://www.leginfo.ca.gov/pub/01-02/bill/asm/ab_0051-0100/ab_93_bill_20011014_chaptered.html)

<sup>4</sup> SANDAG Regional Growth Forecast (2013)

<https://www.sandag.org/index.asp?classid=12&subclassid=84&projectid=503&fuseaction=projects.detail>

<sup>5</sup> SDMAC (2017)

<sup>6</sup> SDMAC (2018)

<sup>7</sup> [https://www.cnrc.navy.mil/regions/cnrsw/om/cnrsw\\_transportation\\_incentive\\_program.html](https://www.cnrc.navy.mil/regions/cnrsw/om/cnrsw_transportation_incentive_program.html)

## Appendix

**Appendix A.** Memorandum of Agreement (MOA) between the U.S. Department of Defense (DoD) and the SANDAG Board of Directors

**Appendix B.** SANDAG Regional Growth Forecast, adopted by the SANDAG Board of Directors in 2013



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## Appendix A.

Memorandum of Agreement (MOA) between the U.S. Department of Defense (DoD) and the SANDAG Board of Directors (2017)

**SAN DIEGO ASSOCIATION OF GOVERNMENTS (SANDAG)  
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**COMMANDING GENERAL,  
MARINE CORPS INSTALLATIONS WEST  
MARINE CORPS BASE, CAMP PENDLETON  
MCIWEST-MCB CAMPEN G-7 GEA/REC  
PO BOX 555010  
CAMP PENDLETON, CA 92055**

**COMMANDING GENERAL,  
MARINE CORPS RECRUIT DEPOT/WESTERN RECRUITING REGION  
1600 HENDERSON AVENUE, SUITE 238  
SAN DIEGO, CA 92140**

**COMMANDER  
UNITED STATES COAST GUARD SECTOR SAN DIEGO  
2170 N HARBOR DRIVE  
SAN DIEGO, CA 92101**

**MEMORANDUM OF AGREEMENT (MOA)  
BETWEEN  
SAN DIEGO ASSOCIATION OF GOVERNMENTS (SANDAG)  
AND  
THE ARMED FORCES:**

**COMMANDER, NAVY REGION SOUTHWEST (CNRSW)  
AND  
MARINE CORPS INSTALLATION WEST-MARINE CORPS BASE, CAMP  
PENDLETON (MCIWEST-MCB CAMPEN)  
AND  
MARINE CORPS RECRUIT DEPOT/WESTERN RECRUITING REGION  
(MCRD/WRR)  
AND  
COMMANDER, UNITED STATES COAST GUARD SECTOR SAN DIEGO (USCG SD)**

**CNRSW  
SSIC 5760  
N00242-20161209-X02-MOA**

**Subj:** MOA to Define Roles and Responsibilities Between SANDAG and the Armed Forces to Facilitate Collaboration in Areas of Mutual Interest

**Ref:** (a) SANDAG and DoD MOA of June 1986  
(b) 2013 SD Regional Military Working Group Charter  
(c) 10 USC§101(a)(4)

1. **Purpose.** This MOA defines roles and responsibilities between SANDAG and the “Armed Forces,” as identified above, and facilitates collaboration in areas of mutual interest, including growth management, habitat, transportation, regional growth, housing, water, energy, and other topics that can help facilitate the parties’ missions.

2. **Background.** SANDAG and the Armed Forces have maintained a collaborative relationship for decades relying on an MOA first executed in 1980 and updated in 1986. See Ref (a). In 2013, in light of continued growth in the County of San Diego, SANDAG formed the San Diego Regional Military Working Group (MWG), which meets regularly to address issues of mutual interest. See Ref (b).

3. **Scope.** This MOA replaces the 1986 MOA to reflect MWG work and updates the military ex-officio liaison membership on the SANDAG Board of Directors. SANDAG and the Armed Services will coordinate via this MOA. “Armed Forces,” for the purposes of this MOA include the US Navy, US Marine Corps and US Coast Guard within the County of San Diego. See Ref (c).

4. **Responsibilities**

4.1. SANDAG will support the MWG consistent with the MWG charter, Ref (b) as follows:

4.1.1 Review current activities and plans being implemented by the various Armed Forces within the County of San Diego.

4.1.2. Coordinate programs, address issues of concern, and determine the best ways in which SANDAG can support effective operations of the military.

4.1.3. Assist with the associated outreach to the military community on issues of regional significance, including development of the regional growth forecast and the Regional Plan.

4.2. CNRSW will:

4.2.1. Represent the Armed Forces as a Department of Defense liaison to SANDAG.

4.2.2. Designate primary and alternate liaisons to SANDAG, in writing, and advise the SANDAG Clerk of the Board, in writing, of any changes.

4.2.3. Support the MWG consistent with its charter, Ref (b).



Subj: MOA to Define Roles and Responsibilities Between SANDAG and the Armed Forces to Facilitate Collaboration in Areas of Mutual Interest

4.2.4. Support relevant SANDAG policy advisory committees.

4.3. The Commanding General, MCIWEST-MCB CAMPEN will:

4.3.1. Support the MWG consistent with its charter.

4.3.2. Support relevant SANDAG policy advisory committees.

4.4. The Commanding General, MCRD/MRR will:

4.4.1. Support the MWG consistent with its charter.

4.4.2. Support relevant SANDAG policy advisory committees.

4.5. The Sector Commander, USCG SD will:

4.5.1. Support the MWG consistent with its charter.

4.5.2. Support relevant SANDAG policy advisory committees.

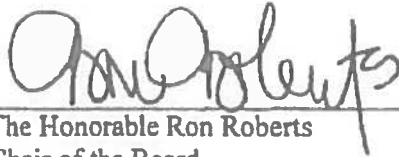
5. Points of Contact (POC). The Commander CNRSW POC is Executive Director, 619-532-2925, 937 N. Harbor Drive, SD, CA 92132. The SANDAG POC is Executive Director, 619-699-1990, 401 B Street, Suite 800, San Diego, CA 92101.

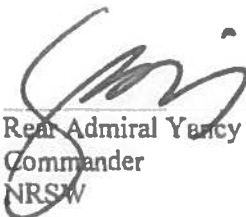
6. Other Provisions. Any obligation of funds by the Armed Forces is subject to the availability of funds. Nothing in this MOA shall be construed to obligate the United States or the Armed Forces to any expenditure of funds in advance of any congressional appropriation.

7. Changes. Changes/amendments to this MOA shall be made by mutual written consent of the signatories, and will be recorded and published as addenda to this MOA.

8. Termination/Expiration. This MOA supersedes reference (a). Any signatory may withdraw from this MOA after giving at least 60 days written notice to the other signatories. This MOA may also be terminated at any time upon the mutual written consent of all signatories. Unless otherwise terminated, this MOA will remain in effect for six years after its effective date and will be reviewed triennially by the MWG.

9. Effective Date. This MOA will become effective on the date of the last signature.

  
The Honorable Ron Roberts  
Chair of the Board  
SANDAG

  
Rear Admiral Yancy Lindsey  
Commander  
NRSW

Subj: MOA to Define Roles and Responsibilities Between SANDAG and the Armed Forces to Facilitate Collaboration in Areas of Mutual Interest

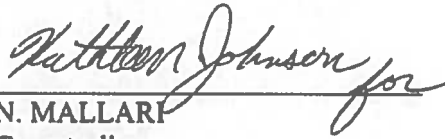


K. J. KILLEA  
Brigadier General, U.S. Marine Corps  
Commanding General  
MCIWEST-MCB CAMPEN  
Date:



W. M. JURNEY  
Brigadier General, U.S. Marine Corps  
Commanding General  
MCRD/WRR  
Date: 27 JUN 2017

JOSEPH BUZZELLA  
CAPT, U.S. Coast Guard  
Commander  
USCG SD  
Date:



N. MALLARI  
Comptroller  
Navy Region Southwest  
Date:



# MILITARY MULTIMODAL ACCESS STRATEGY



BRIEFING BOOK



## Appendix B.

SANDAG Regional Growth Forecast, adopted by the SANDAG Board of Directors (2013)



**BOARD OF DIRECTORS**  
**OCTOBER 25, 2013**

**AGENDA ITEM NO. 13-10-8**

**ACTION REQUESTED - ACCEPT**

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**SERIES 13 REGIONAL GROWTH FORECAST**

File Number 3100900

**Introduction**

During the past year, SANDAG staff, representatives and elected officials from each of the San Diego region's 19 jurisdictions, and stakeholders have worked together to develop a long-range growth forecast for the San Diego region and its neighborhoods.

**Recommendation**

The Board of Directors is asked to accept the Series 13 Regional Growth Forecast for use in San Diego Forward: The Regional Plan and other planning efforts.

**Discussion**

The Series 13 Regional Growth Forecast and accompanying slide presentation (Attachment 1) was presented to the Regional Planning Committee and the Board of Directors in September, and presentations have been made to the majority of the jurisdictions during the past several months.

**Next Steps**

Upon acceptance, the Series 13 Regional Growth Forecast will be used to inform SANDAG planning efforts such as San Diego Forward: The Regional Plan as well as by partner agencies such as the San Diego County Water Authority for use in its Urban Water Management Plan.

GARY L. GALLEGOS  
Executive Director

Attachment: 1. Series 13 Regional Growth Forecast Report, Table, and Slide Presentation from September 13, 2013, Board of Directors meeting

Key Staff Contacts: Kirby Brady, (619) 699-6924, kirby.brady@sandag.org  
Clint Daniels, (619) 699-6946, clint.daniels@sandag.org





**BOARD OF DIRECTORS  
SEPTEMBER 13, 2013**

**AGENDA ITEM NO. 13-9-2  
ACTION REQUESTED - INFORMATION**

**SERIES 13 REGIONAL GROWTH FORECAST:  
DRAFT SUBREGIONAL FORECAST**

File Number 3100900

**Introduction**

During the past 12 months, SANDAG staff and representatives and elected officials from each of the San Diego region's 19 jurisdictions and stakeholders have worked together to develop a long-range growth forecast for the San Diego region and its neighborhoods. The Series 13 Regional Growth Forecast<sup>1</sup> will serve as the foundation for San Diego Forward: The Regional Plan, including the alternative land use and transportation scenarios and other planning documents (e.g., water, general plans) across the region. The preliminary results of that effort are described in detail, below.

**Discussion**

**Overview of Forecasted Regional Growth**

As shown in Table 1, SANDAG projects the region's population will grow by nearly one million people by 2050. This forecast is consistent with previous expectations, although future growth rates have been reduced due to increased domestic migration out of the region. The growth in population will drive job growth and housing demand within the region, adding nearly 500,000 jobs and more than 330,000 housing units by 2050.

**Table 1: Series 13 San Diego Regional Growth Forecast**

	Population		Housing Units		Jobs	
	Total	Percent Average Annual Change	Total	Percent Average Annual Change	Total	Percent Average Annual Change
2010 <sup>2</sup>	3,095,313	-	1,158,076	-	1,421,941	-
2012	3,143,429	0.8%	1,165,818	0.3%	1,450,913	1.0%
2020	3,435,713	1.1%	1,249,654	0.9%	1,624,124	1.4%
2035	3,853,698	0.8%	1,394,688	0.7%	1,769,938	0.6%
2050	4,068,759	0.4%	1,491,804	0.4%	1,911,405	0.5%
<b>2010-2050</b>	<b>973,446</b>	<b>0.7%</b>	<b>333,728</b>	<b>0.6%</b>	<b>489,464</b>	<b>0.7%</b>

<sup>1</sup> SANDAG denotes forecasts by a sequential series number. The current working forecast is known as the Series 13: 2050 Regional Growth Forecast. The forecast used in the 2050 Regional Transportation Plan and its Sustainable Communities Strategy adopted by the Board of Directors in October 2011 was the Series 12: 2050 Regional Growth Forecast.

<sup>2</sup> Data from 2010 are included as reference to the U.S. Census for population. Housing and Jobs in 2010 are sourced from the SANDAG land inventory system and California Employment Development Department. San Diego Forward: The Regional Plan will use 2012 as its reference year.

Much of the region's growth will be driven by natural increase, total births minus deaths. Longer life expectancies will contribute to the aging population seen in the outer years of the forecast, while the trends of increased deaths (as a result of the older population) and net out-migration will factor into the slower growth rates anticipated in the future. By 2050 it is expected that nearly 20 percent of the population will be ages 65 and over, compared with just 12 percent today.

In terms of the race and ethnic composition of the region, significant changes are on the horizon. The 2010 census revealed San Diego to now be a majority-minority region, meaning no single race or ethnic group comprises more than 50 percent of the total population. In 2010 the two dominant race and ethnic groups were non-Hispanic whites and Hispanics, accounting for 48 percent and 32 percent of the region's total population, respectively. By 2050, however, it is expected that Hispanics will account for more than 46 percent of the total population while the non-Hispanic White population will decline to approximately 30 percent. The Asian population is expected to increase to more than 15 percent, up from 11 percent in 2010. Non-Hispanic blacks, two or more races, and "other" groups each comprise less than 5 percent of the total population today and are expected to remain relatively unchanged out to 2050.

### ***Changing Local Plans***

This forecast represents a continuing trend in the San Diego region to provide more housing and job opportunities in the existing urbanized areas of the region. Since 1999, more than three quarters of the local jurisdictions have made or are in the process of making significant updates to their general plans. In 1999, SANDAG projected 21 percent of future housing growth would occur in the unincorporated areas of the county under the local general plans at the time. Today, SANDAG expects 17 percent of growth to occur in the unincorporated areas, and much of that is focused in existing villages such as Lakeside, Valley Center, Ramona, and Alpine. As a result of these updates, SANDAG has identified sufficient housing opportunities in the existing general plans for the first time in nearly two decades.

The forecasted growth also reflects more sustainable general plans from the local jurisdictions. At the turn of the century, about 90 percent of vacant residential land in the cities was planned for single-family use. The Series 13 Forecast shows 82 percent of housing growth by 2050 being multifamily. Local and regional conservation programs also continue to protect more of the San Diego region's sensitive lands. Currently, more than 50 percent of the region is preserved as open space, parks, or habitat, and SANDAG forecasts that dedicated open space will increase by almost 30 percent by 2050.

### ***General Intensification of Existing Uses***

As a result of changing local plans, SANDAG forecasts a general intensification of existing land uses within urban communities and along key transportation corridors. For example, National City's general plan update results in opportunities for more than 10,000 additional multifamily units near the Blue Line Trolley and the planned Trolley line connecting San Ysidro and University Towne Centre (UTC) via National City. San Marcos has drafted specific plans for the San Marcos Creek and University districts, adding mixed-use developments near California State University, San Marcos and the SPRINTER rail corridor. Finally, over half of the growth in new housing will occur in the city of San Diego. Downtown San Diego will continue to thrive over the next few decades, and the growth also will start to occur into areas of Barrio Logan, Golden Hill, and Uptown communities.

In terms of jobs, SANDAG expects the existing employment centers to continue to thrive. The UTC/Sorrento Valley/Torrey Mesa employment cluster will continue to be the largest job center in the region. SANDAG expects downtown San Diego to add another 30,000 jobs by 2050. The Otay Mesa border area will become a much larger job center, growing from approximately 15,000 jobs today to more than 45,000 by 2050. Finally, Chula Vista will add nearly 50,000 new jobs as the Chula Vista Bayfront, downtown investments, and new planned communities in eastern Chula Vista come online.

More detailed results of this growth forecast are shown by jurisdiction in Attachment 1.

### **SANDAG Forecasting Process**

The SANDAG forecast is completed in two steps. The first is the development of a regional forecast of population, housing, and jobs. The regional forecast establishes the framework for the next step, the subregional forecast. The regional forecast is developed by SANDAG, with input from expert demographers, economists, developers, local planning directors, and natural resource managers. These experts review economic and demographic assumptions about fertility, migration, inflation, and other indicators. In addition to the traditional expert panel review conducted by the agency, SANDAG also has reviewed the forecast with key stakeholders across the region, including transportation, land use, and economic development advocates.

SANDAG uses its Demographic and Economic Forecasting Model (DEFM) to develop the regional forecast. DEFM was first developed to support the Series 4 forecast in the late 1970s. DEFM uses a standard demographic (i.e., cohort-survival) economic modeling technique to estimate future growth. Forecasts developed using DEFM have had strong accuracy; since Series 4 (1977), on average DEFM regional forecasts have been within 4 percent of observed population growth.

The DEFM results feed the subregional allocation models to develop city- and community-level forecasts. The Series 13 subregional forecast employs a new tool called the Production, Exchange, Consumption, and Allocation System (PECAS). This new model offers several enhancements beyond the subregional forecasting models used in prior forecasts by introducing economic conditions and return on investment calculations into the projections of development, redevelopment, and infill. PECAS, in addition to new data sources, continues to rely upon the land use plans, policies, and zoning ordinances of the 18 cities, the County of San Diego, and other land use authorities.

For the development of the subregional forecast, SANDAG staff works extensively with each jurisdiction to collect and verify detailed land use inputs down to the parcel level. The data collected includes information on remaining housing capacity, zoning, existing and planned land use, as well as constraints to development (e.g., steep slopes, habitat lands, floodplains, etc.).

In addition to providing land use information, each jurisdiction is asked to provide guidance on the most likely development patterns for their jurisdiction by 2050.

A preliminary draft of the subregional forecast was presented to the Regional Planning Technical Working Group (the region's planning directors) on June 13, 2013. SANDAG staff consulted with each jurisdiction to review these numbers and incorporate any necessary changes to the revised draft subregional forecast.

This report is scheduled to be presented to the Regional Planning Committee for discussion at its September 6, 2013, meeting. Any comments resulting from that discussion will be included in the September 13, 2013, presentation to the Board of Directors.

GARY L. GALLEGOS  
Executive Director

Attachment: 1. Draft Series 13 Subregional Growth Forecast

Key Staff Contacts: Kirby Brady, (619) 699-6924, kirby.brady@sandag.org  
Clint Daniels, (619) 699-6946, clint.daniels@sandag.org

## Draft Series 13 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 Series 13 Regional Growth Forecast represents a combination of economic and demographic projections and existing plans and policies.

### POPULATION

	Actual		Projections		Numeric Change by Increment			Change 2010 - 2050		
	2010	2020	2035	2050	2010-2020	2020-35	2035-50	Total	Percent	Avg Ann
Carlsbad	105,185	118,241	123,634	123,942	13,056	5,393	308	18,757	17.8%	0.4%
Chula Vista	243,916	286,744	320,297	343,752	42,828	33,553	23,455	99,836	40.9%	0.9%
Coronado	24,697	23,633	24,145	24,286	(1,064)	512	141	(411)	-1.7%	0.0%
Del Mar	4,161	4,412	4,668	4,784	251	256	116	623	15.0%	0.3%
El Cajon	99,478	102,745	109,222	115,419	3,267	6,477	6,197	15,941	16.0%	0.4%
Encinitas	59,518	62,829	64,718	66,178	3,311	1,889	1,460	6,660	11.2%	0.3%
Escondido	143,951	165,051	172,890	173,253	21,100	7,839	363	29,302	20.4%	0.5%
Imperial Beach	26,324	27,510	30,354	31,579	1,186	2,844	1,225	5,255	20.0%	0.5%
La Mesa	57,065	61,092	70,151	77,411	4,027	9,059	7,260	20,346	35.7%	0.8%
Lemon Grove	25,320	26,821	28,774	30,796	1,501	1,953	2,022	5,476	21.6%	0.5%
National City	58,582	62,265	74,343	85,424	3,683	12,078	11,081	26,842	45.8%	0.9%
Oceanside	167,344	177,929	188,865	190,129	10,585	10,936	1,264	22,785	13.6%	0.3%
Poway	47,811	50,010	52,670	52,860	2,199	2,660	190	5,049	10.6%	0.3%
San Diego	1,301,617	1,454,150	1,664,684	1,766,700	152,533	210,534	102,016	465,083	35.7%	0.8%
San Marcos	83,781	98,940	108,470	112,323	15,159	9,530	3,853	28,542	34.1%	0.7%
Santee	53,413	59,488	63,518	66,279	6,075	4,030	2,761	12,866	24.1%	0.5%
Solana Beach	12,867	13,409	14,311	14,941	542	902	630	2,074	16.1%	0.4%
Vista	93,719	96,973	112,175	126,508	3,254	15,202	14,333	32,789	35.0%	0.8%
Unincorporated	486,564	543,471	625,809	662,195	56,907	82,338	36,386	175,631	36.1%	0.8%
Region Total	3,095,313	3,435,713	3,853,698	4,068,759	340,400	417,985	215,061	973,446	31.4%	0.7%

### HOUSING

	Actual		Projections		Numeric Change by Increment			Change 2010 - 2050		
	2010	2020	2035	2050	2010-2020	2020-35	2035-50	Total	Percent	Avg Ann
Carlsbad	44,422	48,390	49,978	50,212	3,968	1,588	234	5,790	13.0%	0.3%
Chula Vista	78,384	89,063	98,924	107,471	10,679	9,861	8,547	29,087	37.1%	0.8%
Coronado	9,581	9,667	9,702	9,799	86	35	97	218	2.3%	0.1%
Del Mar	2,606	2,639	2,650	2,667	33	11	17	61	2.3%	0.1%
El Cajon	35,884	36,180	38,126	40,766	296	1,946	2,640	4,882	13.6%	0.3%
Encinitas	25,481	26,131	26,633	27,667	650	502	1,034	2,186	8.6%	0.2%
Escondido	47,971	53,563	55,512	55,827	5,592	1,949	315	7,856	16.4%	0.4%
Imperial Beach	9,860	10,014	10,928	11,520	154	914	592	1,660	16.8%	0.4%
La Mesa	25,954	26,463	30,036	33,374	509	3,573	3,338	7,420	28.6%	0.6%
Lemon Grove	8,840	9,100	9,685	10,517	260	585	832	1,677	19.0%	0.4%
National City	16,200	17,423	21,090	24,812	1,223	3,667	3,722	8,612	53.2%	1.1%
Oceanside	65,014	67,965	70,812	71,248	2,951	2,847	436	6,234	9.6%	0.2%
Poway	16,476	16,853	17,602	17,800	377	749	198	1,324	8.0%	0.2%
San Diego	515,426	559,197	640,194	691,629	43,771	80,997	51,435	176,203	34.2%	0.7%
San Marcos	28,174	32,622	35,596	37,118	4,448	2,974	1,522	8,944	31.7%	0.7%
Santee	19,900	21,489	22,687	23,903	1,589	1,198	1,216	4,003	20.1%	0.5%
Solana Beach	6,521	6,583	6,870	7,118	62	287	248	597	9.2%	0.2%
Vista	30,875	31,015	35,369	40,201	140	4,354	4,832	9,326	30.2%	0.7%
Unincorporated	170,507	185,297	212,294	228,155	14,790	26,997	15,861	57,648	33.8%	0.7%
Region Total	1,158,076	1,249,654	1,394,688	1,491,804	91,578	145,034	97,116	333,728	28.8%	0.6%

### JOBS

	Actual		Projections		Numeric Change by Increment			Change 2010 - 2050		
	2010	2020	2035	2050	2010-2020	2020-35	2035-50	Total	Percent	Avg Ann
Carlsbad	64,956	77,431	83,938	85,718	12,475	6,507	1,780	20,762	32.0%	0.7%
Chula Vista	64,035	82,966	100,096	114,435	18,931	17,130	14,339	50,400	78.7%	1.5%
Coronado	28,535	29,116	29,247	29,273	581	131	26	738	2.6%	0.1%
Del Mar	4,431	4,542	4,691	4,725	111	149	34	294	6.6%	0.2%
El Cajon	37,626	41,412	45,146	49,780	3,786	3,734	4,634	12,154	32.3%	0.7%
Encinitas	25,643	27,276	28,364	29,542	1,633	1,088	1,178	3,899	15.2%	0.4%
Escondido	47,869	53,495	57,479	59,061	5,626	3,984	1,582	11,192	23.4%	0.5%
Imperial Beach	3,592	4,556	4,805	4,830	964	249	25	1,238	34.5%	0.7%
La Mesa	24,729	28,677	33,847	36,527	3,948	5,170	2,680	11,798	47.7%	1.0%
Lemon Grove	6,639	7,320	7,987	8,653	681	667	666	2,014	30.3%	0.7%
National City	26,826	30,293	32,660	39,785	3,467	2,367	7,125	12,959	48.3%	1.0%
Oceanside	41,142	48,208	52,927	54,091	7,066	4,719	1,164	12,949	31.5%	0.7%
Poway	30,235	34,012	35,809	37,199	3,777	1,797	1,390	6,964	23.0%	0.5%
San Diego	764,671	867,567	934,806	1,009,177	102,896	67,239	74,371	244,506	32.0%	0.7%
San Marcos	36,857	45,793	55,207	64,282	8,936	9,414	9,075	27,425	74.4%	1.4%
Santee	14,229	16,501	18,212	18,565	2,272	1,711	353	4,336	30.5%	0.7%
Solana Beach	7,417	8,156	8,509	8,802	739	353	293	1,385	18.7%	0.4%
Vista	35,124	40,971	48,007	48,812	5,847	7,036	805	13,688	39.0%	0.8%
Unincorporated	157,385	175,832	188,201	208,148	18,447	12,369	19,947	50,763	32.3%	0.7%
Region Total	1,421,941	1,624,124	1,769,938	1,911,405	202,183	145,814	141,467	489,464	34.4%	0.7%



# Series 13 Regional Growth Forecast

## Preliminary Subregional Forecast

Board of Directors  
September 13<sup>th</sup>, 2013



1



An aging, diversifying  
population...

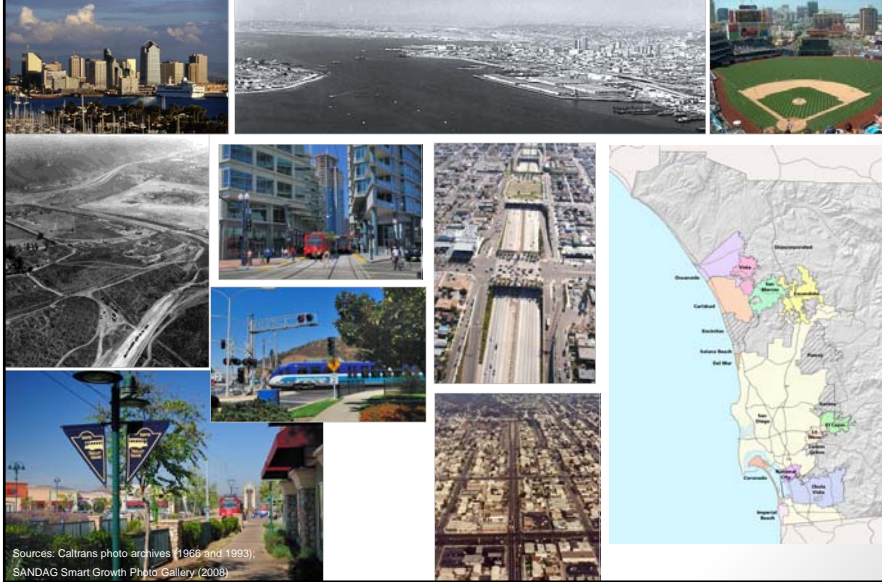
Growing more  
sustainably...



Dedicating more  
lands to  
preservation...

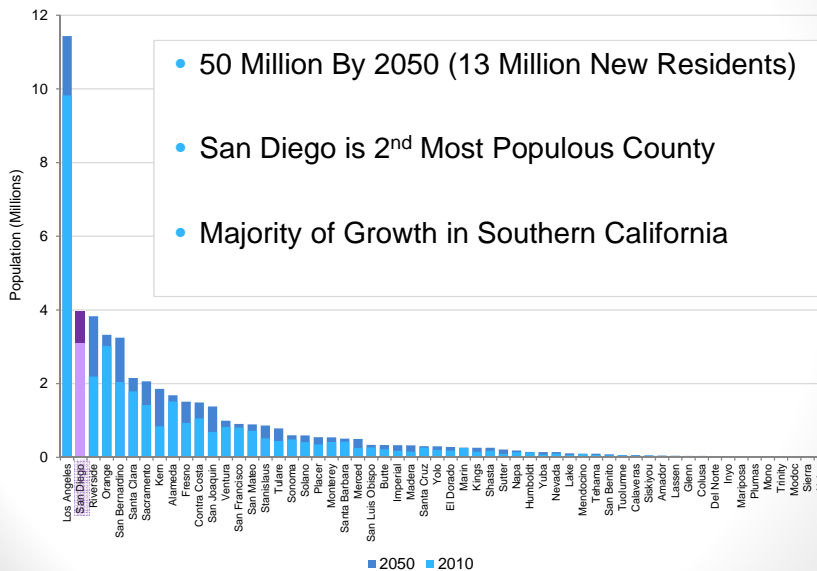
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# Forty Years in San Diego



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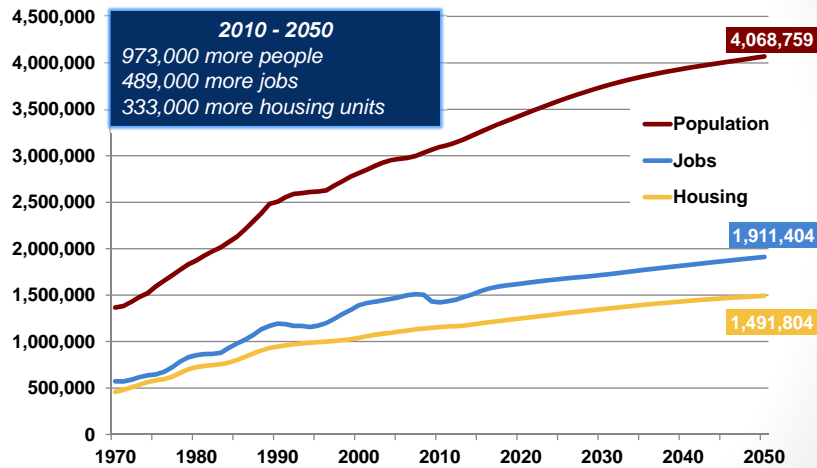
# 2050 California Forecast



Source: State of California, Department of Finance, Report P-1 (County): State and County Total Population Projections, 2010-2060. Sacramento, California, January 2013.

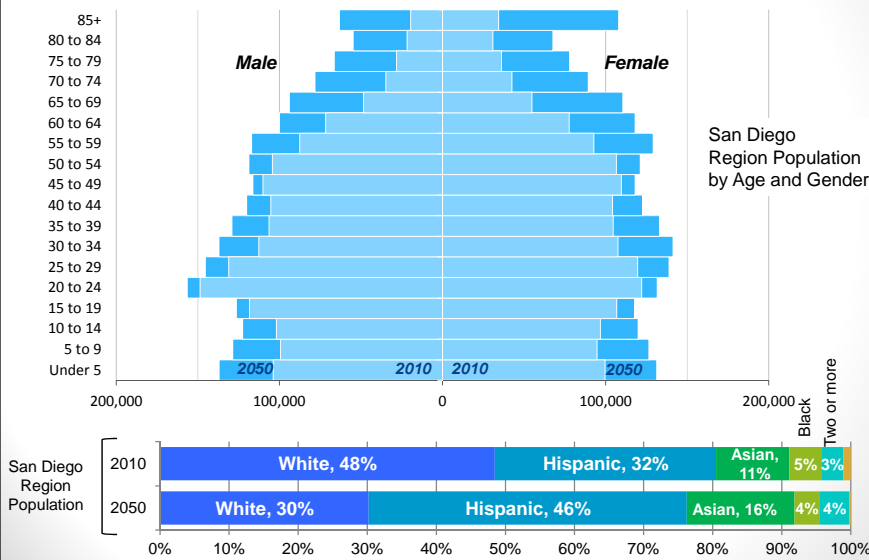
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# Population, Jobs, and Housing

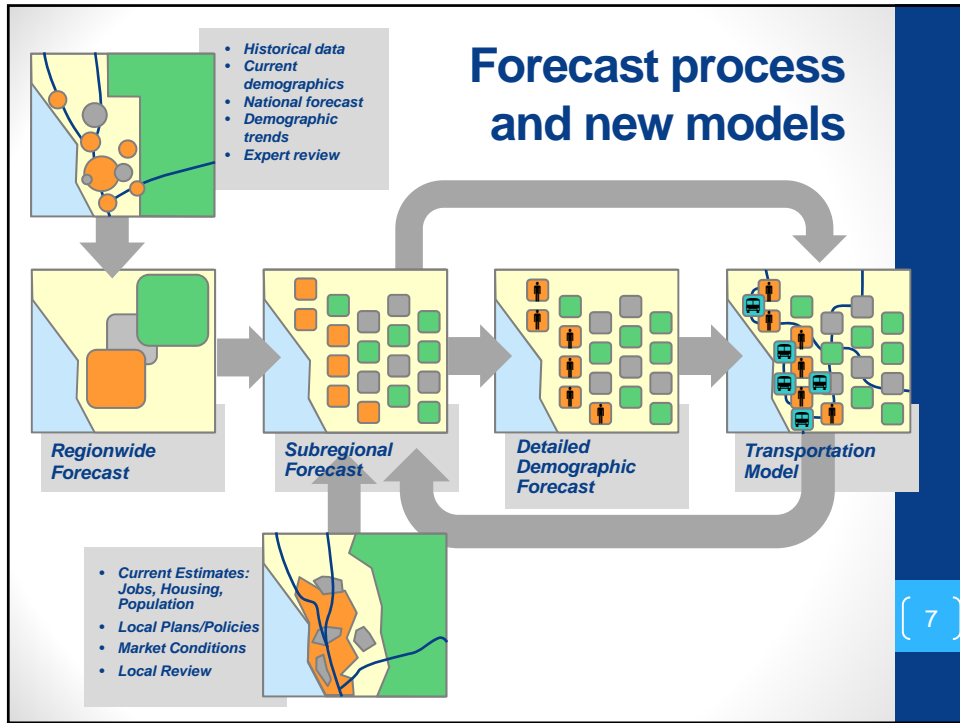


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# Series 13 Subregional Forecast: Population Trends



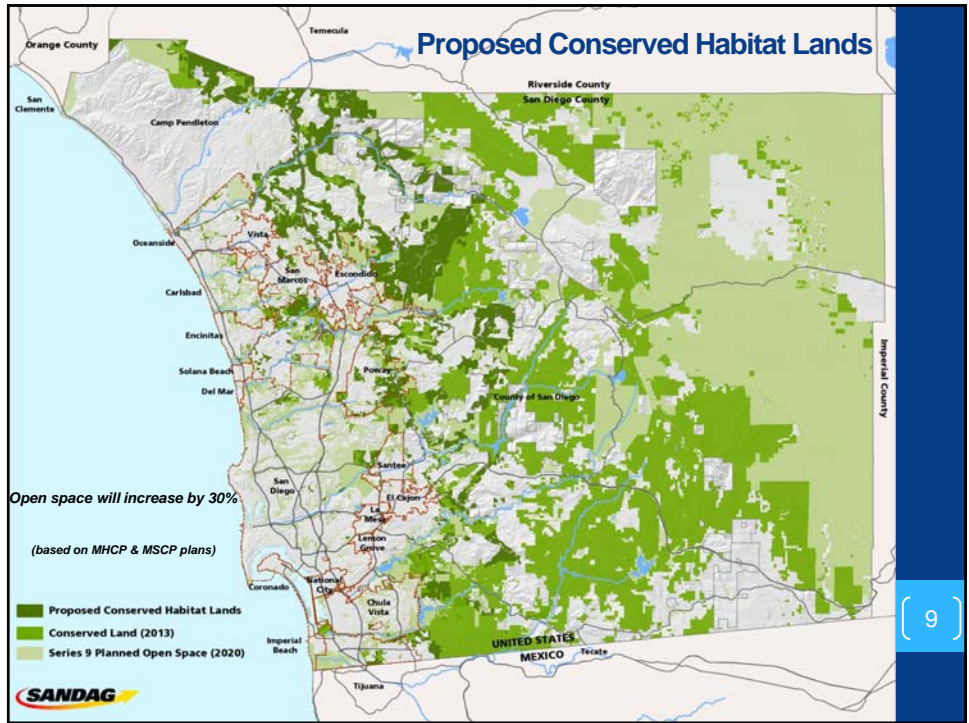
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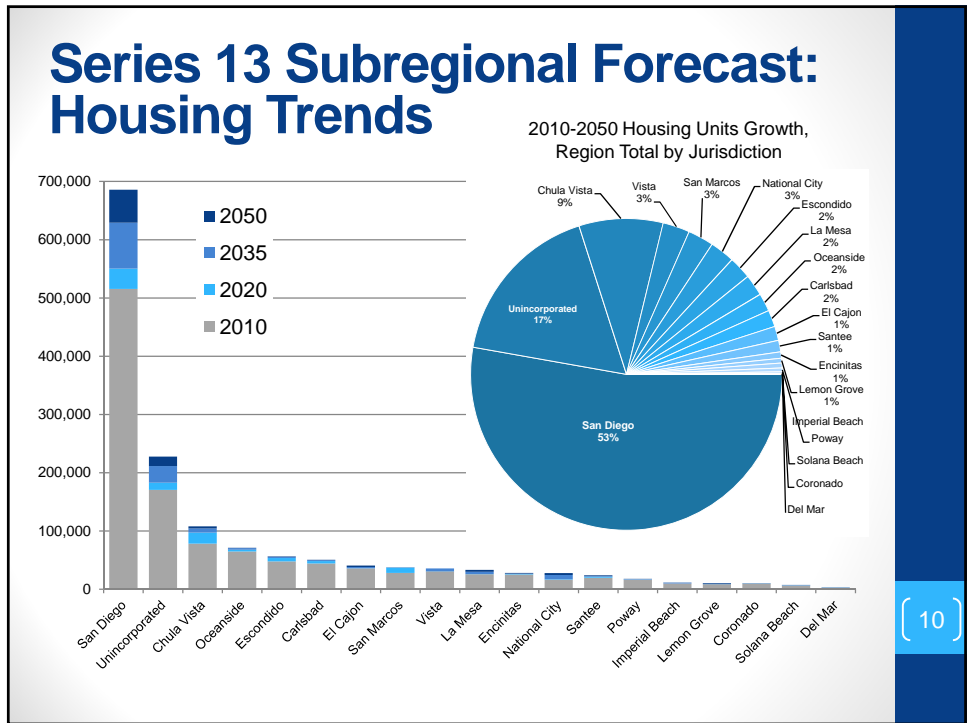
## Series 13 Subregional Forecast: Land Use Inputs

- Updated General Plans
  - Chula Vista (SP)
  - Escondido
  - Imperial Beach
  - National City
  - San Diego
  - San Marcos (SP)
  - Vista
  - County
- Site Specific Projects
- Sufficient Housing Lands

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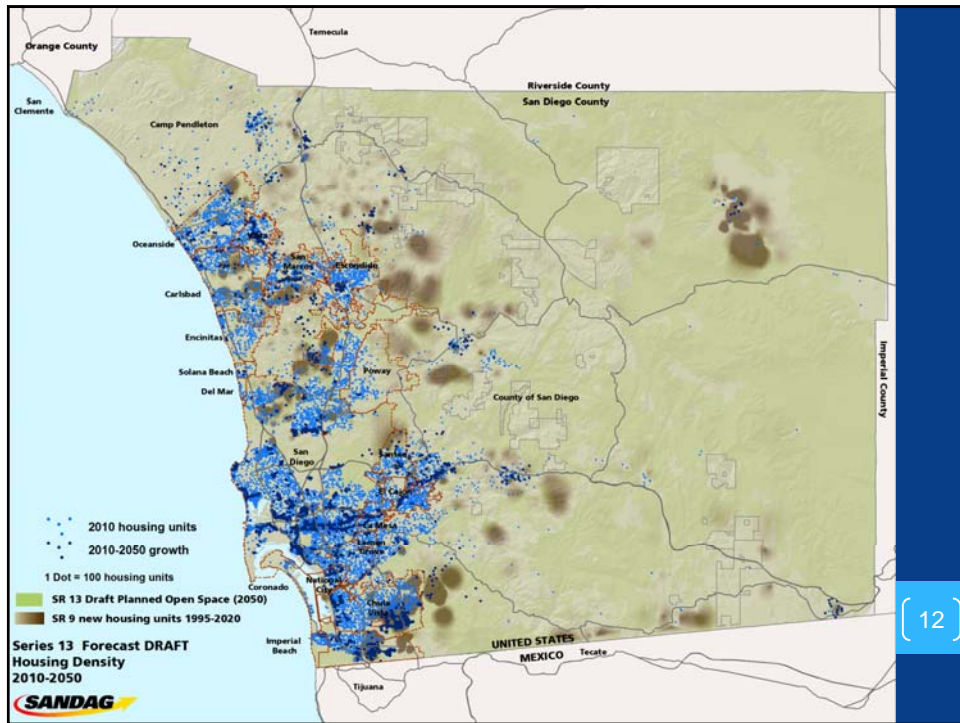
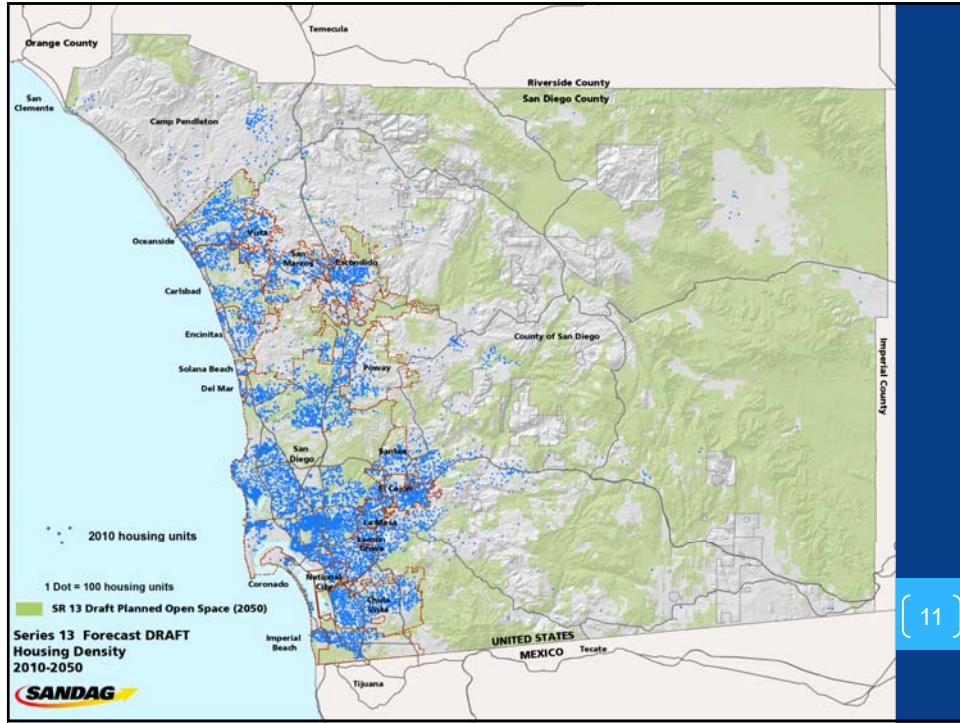


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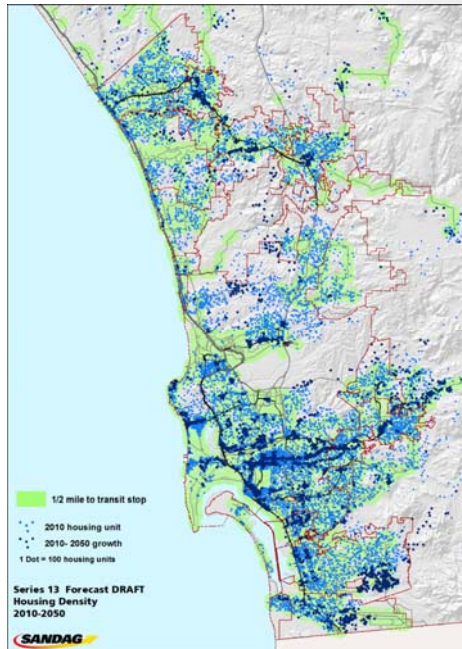
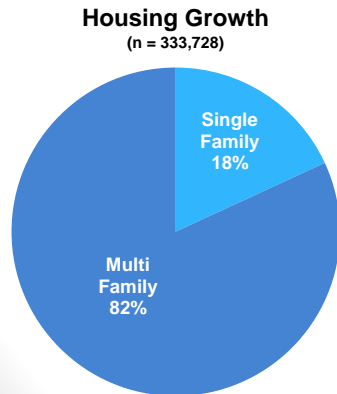
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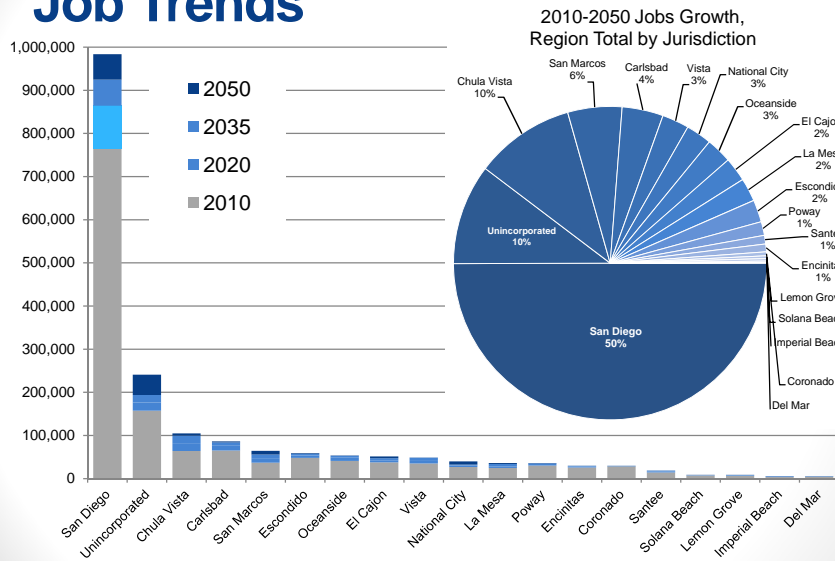
## Series 13 Subregional Forecast Housing Growth

- 87% of growth within 1/2 mile to transit

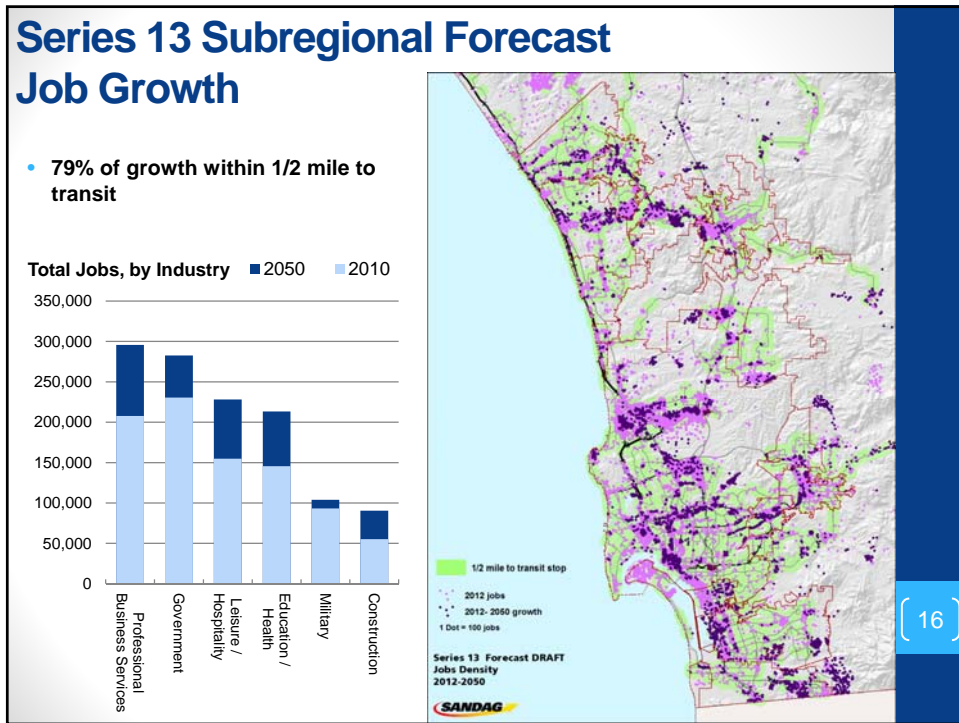
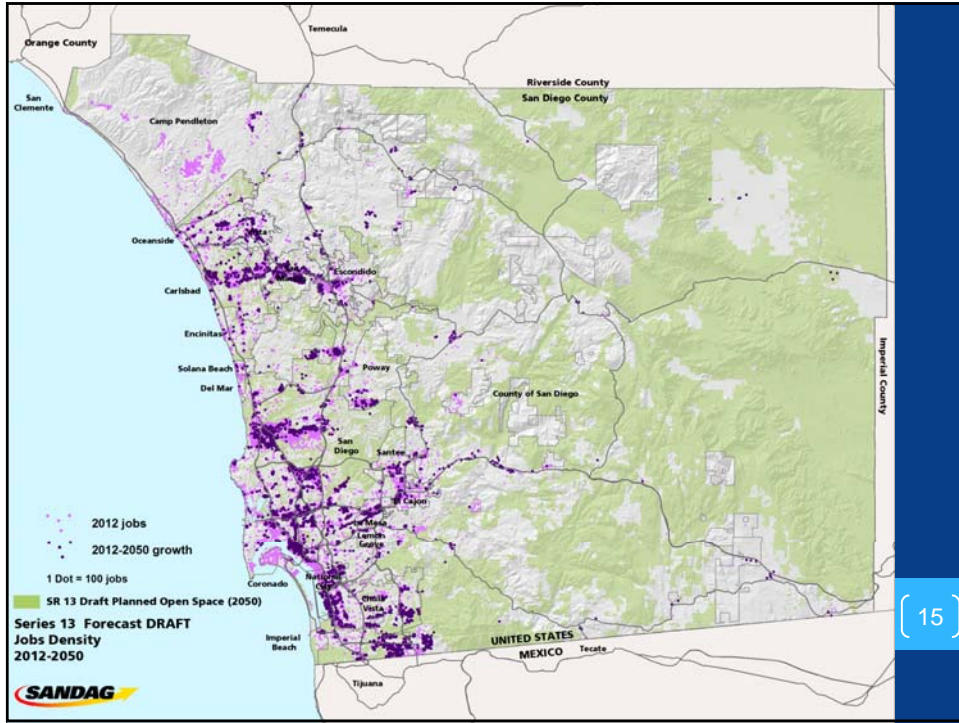


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## Series 13 Subregional Forecast: Job Trends



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**An aging, diversifying population...**

**Growing more sustainably...**



**Dedicating more lands to preservation...**