SANDAG infobits

Series 15 Forecast: What Will the Region Look Like in 2050?
MARCH 2024

Every four years, the SANDAG Data Science team works with local jurisdictions, the California State Department of Finance, demographic and economic experts, and other stakeholders to create a long-term forecast that predicts what the region will look like in terms of population, housing units, and number of jobs. The draft Series 15 forecast, which has a launch year of 2022 and looks out to 2050, was recently completed and is being used in the modeling and planning for the **2025 Regional Plan** to identify how we will improve transportation, equity, and the environment for people in the greater San Diego area to meet our regional goals. It is also used by local jurisdictions as part of their planning efforts and by other municipal departments and agencies. This InfoBits highlights trends from this new forecast and discusses implications for the region. Series 15 forecast data will also be available on SANDAG's **Open Data Portal** in Spring 2024.

Did you know?

1 in 5 people will be over the age of 65 in 2050, compared to 1 in 10 in 2000.

Jurisdictions with the largest growth in population and housing between now and 2050 include San Diego, Chula Vista, and San Marcos.

The region's population in 2050 is expected to be only 3% higher than in 2022, with an additional 1 resident for every 29 we had in 2022.

Population Assumptions

Our population forecast reflects assumptions regarding births, deaths, and net migration. We are expecting to see fewer births, more deaths, and an initial increase but eventual decline of net migration, which translates to smaller population growth in our future. By 2050, we are expecting births to be lower than in 2022, reflecting in part the aging of the population, as well as lower birth rates among young individuals, which has been a trend in recent years. For deaths, the model assumes there will be improvements in infant mortality, but that rates will be stable for other ages. With an aging population, there will be more deaths in 2050 than in earlier years. Finally, net migration reflects both domestic and foreign migration into and out of the San Diego region. For the past two decades, net domestic migration has been an outflow and while international migration has typically been positive, it has not been enough to offset the outflow in recent years.

How Will the Number of People in the San Diego Region Change?

As Figures 1 and 2 show, the greatest population growth in the San Diego region occurred between 1950 and 1990. Since then, the population has continued to grow, but at a slower rate, to approximately 3.33 million residents in 2020. Between 2020 and 2042, the region is expected to add almost 103,000 residents. After that, the population is expected to decrease to around 3.40 million in 2050. In 2050, the population will be three percent higher than in 2022, adding 1 new resident for every 29 living here now. The forecasted trends are similar to California state trends over the same period.

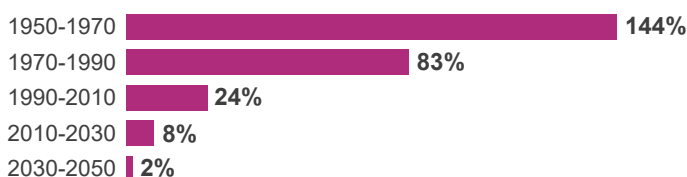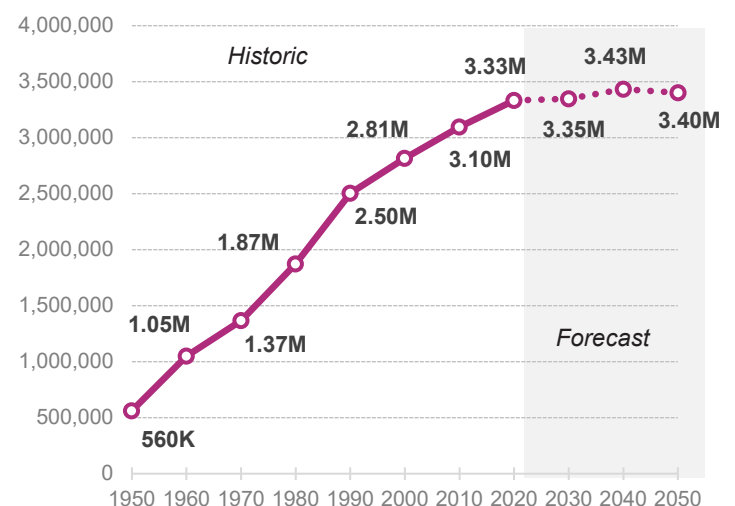Figure 1: HISTORIC AND FORECASTED CHANGE IN THE SAN DIEGO REGION POPULATION

Period	Change
1950-1970	144%
1970-1990	83%
1990-2010	24%
2010-2030	8%
2030-2050	2%

Figure 2: HISTORIC AND FORECASTED POPULATION IN THE SAN DIEGO REGION

Historic
Forecast

560K
1.05M
1.37M
1.87M
2.50M
2.81M
3.10M
3.33M
3.35M
3.43M
3.40M

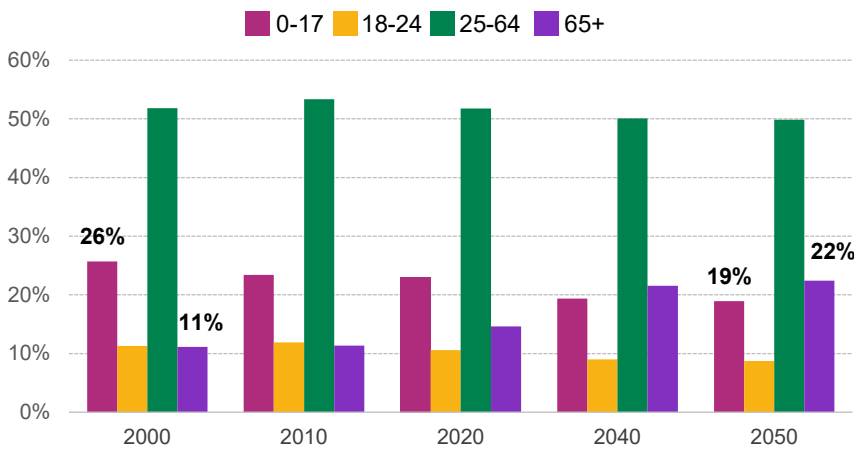1950 1960 1970 1980 1990 2000 2010 2020 2030 2040 2050

Between 2022 and 2050, the population of eleven of the region's jurisdictions (including the unincorporated area) is expected to decline, while eight jurisdictions are projected to grow. The jurisdictions with the largest population growth include San Marcos (18%), Chula Vista (18%), Santee (7%), Oceanside (6%), and the City of San Diego (5%). Because San Diego is the largest city in the County, it will have the greatest increase in population in terms of the number of new residents (Table 1).

## How Will the Characteristics of People in the San Diego Region Change?

Over the coming decades, the region's population will become older and more diverse ethnically. While one in ten of our residents was over the age of 65 in 2000 (and the median age was 36), they will be around one in five by 2050 (and the median age will be 42) (Figure 3). This translates to several policy implications, from the need for services, transportation choices, types of trips with fewer school-age children, and also the type of housing that may be needed.

Table 1: FORECASTED CHANGE IN POPULATION BY JURISDICTION 2022-2050

Jurisdiction	Population Change #	Population Change %
Carlsbad	1,240	1.1%
Chula Vista	48,702	17.6%
Coronado	-1,536	-6.9%
Del Mar	-220	-5.6%
El Cajon	-6,404	-6.1%
Encinitas	-1,688	-2.7%
Escondido	448	0.3%
Imperial Beach	-841	-3.2%
La Mesa	-1,255	-2.1%
Lemon Grove	-979	-3.6%
National City	174	0.3%
Oceanside	10,481	6.1%
Poway	-228	-0.5%
San Diego	65,345	4.8%
San Marcos	16,423	17.5%
Santee	3,861	6.5%
Solana Beach	-879	-6.9%
Vista	-1,195	-1.2%
Unincorporated	-18,505	-3.6%
Region	**112,944**	**3.4%**

Figure 3: AGE BREAKDOWN OF THE SAN DIEGO REGION'S POPULATION, 2000-2050

As Figure 4 shows, the region will also continue to grow more diverse over time, with the greatest change in the proportion of the population that is Asian, which reflects births, life expectancy, and migration trends. The non-Hispanic White population is expected to shrink, in part due to mortality associated with the Baby Boom generation and migration out of the region.

Figure 4: ETHNIC BREAKDOWN OF THE SAN DIEGO REGION'S POPULATION, 2000-2050
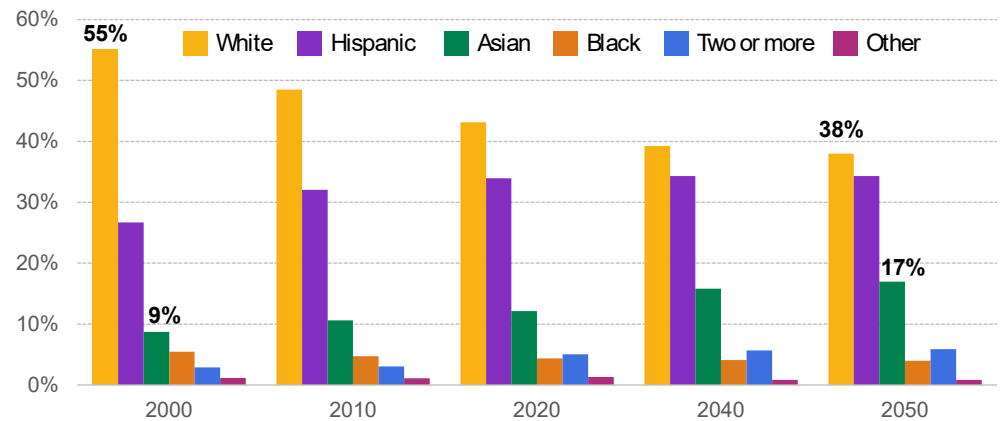
NOTE: American Indian, Alaska Native, Native Hawaiian and Pacific Islander races comprise less than one percent of the population and are included in the Other category.

How Will the Number of Housing Units in San Diego County Change?

The Series 15 forecast predicts both how many households and housing units there will be in the future. Because the population is aging, there will be an increased need for housing since older individuals are more likely to live in households with fewer people than younger individuals. This trend, combined with the fact that population growth in the San Diego region has historically exceeded housing production, shows how even with a slowing in population growth (and eventual decline), there remains a need for more housing production. The Series 15 forecast expects the region to add over 202,000 housing units from 2022 to 2050 (an increase of 16% from the current housing stock) (Figure 5).
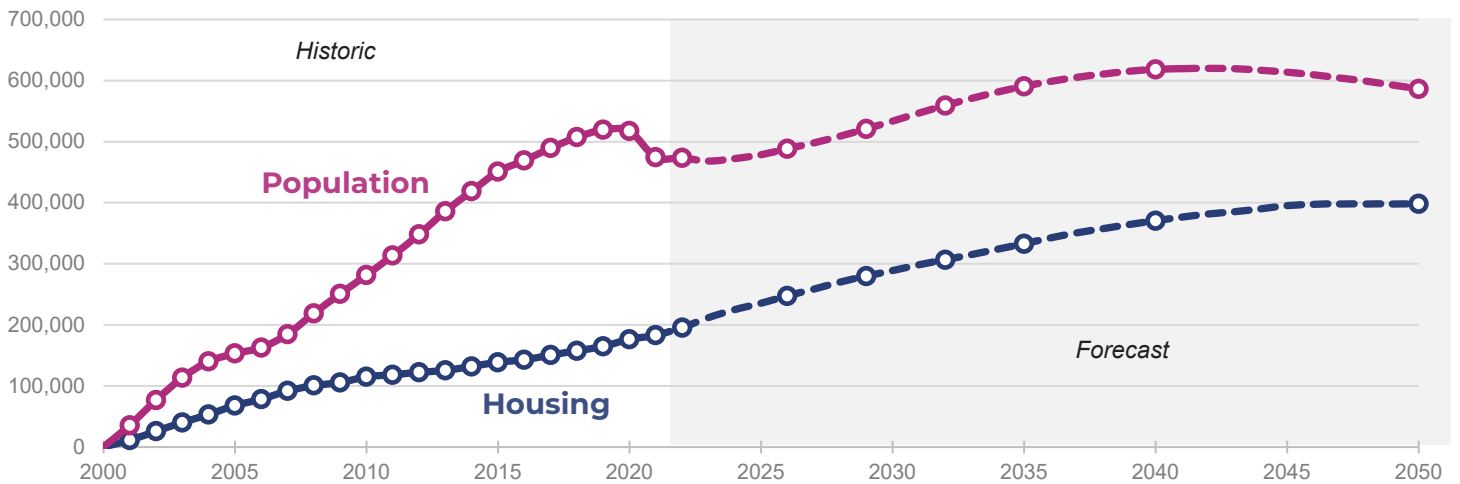
Housing Assumptions

Our housing model starts with the existing housing stock, excluding group quarters, and considers how many are occupied, what the vacancy rate is for owned and rented properties, how many are unavailable because they are vacation homes or used for short term rentals, and what the household formation rate is expected to be.

Table 2: FORECASTED CHANGE IN HOUSING BY JURISDICTION 2022-2050

Jurisdiction	Housing Change #	Housing Change %
Carlsbad	6,153	12.8%
Chula Vista	26,550	30.1%
Coronado	134	1.4%
Del Mar	111	4.2%
El Cajon	1,708	4.7%
Encinitas	2,118	7.9%
Escondido	6,216	12.6%
Imperial Beach	868	8.7%
La Mesa	1,938	7.4%
Lemon Grove	757	8.2%
National City	2,492	14.0%
Oceanside	13,954	20.6%
Poway	1,929	11.5%
San Diego	107,235	19.4%
San Marcos	10,444	32.3%
Santee	3,653	17.0%
Solana Beach	239	3.7%
Vista	3,436	10.2%
Unincorporated	12,884	7.2%
Region	**202,819**	**16.4%**

As Table 2 shows, each of the jurisdictions in the region is expected to add housing units, with those jurisdictions with the largest population growth adding the greatest number of housing units, including San Marcos (32%), Chula Vista (30%), Oceanside (21%), San Diego (19%), and Santee (17%). Again, as the largest jurisdiction in the County, San Diego is adding the greatest number of housing units (107,235), more than four times more than Chula Vista (which is adding the second greatest in terms of number).

Figure 5: HISTORIC AND FORECASTED POPULATION AND HOUSING GROWTH IN THE SAN DIEGO REGION 2000-2050

How Will the Number of Jobs in San Diego County Change?

While the Series 15 forecast projects that the number of people in the region will eventually decrease, it also includes continued growth in the number of jobs in the region. Continued job growth is also possible for several reasons. A key factor is that the region's prime working age population (25 to 64) remains stable and changes the least of all age groups (Figure 3). Additionally, the job forecast accounts for more individuals working more than one job, gig work increasing, and the region being able to attract workers from outside the county.

At the regional level, wage and salary jobs will increase eleven percent, with all jurisdictions having some level of increase. The jurisdictions with the largest increase include Imperial Beach (50%), whose general plan allows for a significant amount of business development, Chula Vista (38%), Oceanside (36%), and San Marcos (30%) (Table 3).

Job Assumptions

For our job forecast, economic data are used with the population data to forecast the number of jobs, rather than the number of employed persons in the region. In Series 15, both wage and salary and non-wage and salary workers, such as real estate agents and Uber/Lyft drivers, are included. This change better accounts for the different types of jobs in the region. Since 2010, non-wage and salary jobs in the region have been growing twice as fast as wage and salary jobs.

Table 3: FORECASTED CHANGE IN WAGE AND SALARY JOBS BY JURISDICTION 2022-2050

Jurisdiction	Jobs Change #	Jobs Change %
Carlsbad	5,994	7.6%
Chula Vista	28,473	38.1%
Coronado	240	0.8%
Del Mar	50	1.3%
El Cajon	4,474	10.2%
Encinitas	848	3.2%
Escondido	2,108	3.9%
Imperial Beach	2,532	49.9%
La Mesa	2,222	8.8%
Lemon Grove	1,431	18.0%
National City	3,196	8.2%
Oceanside	17,223	35.8%
Poway	281	0.8%
San Diego	67,305	7.7%
San Marcos	12,204	30.4%
Santee	1,466	8.2%
Solana Beach	131	1.4%
Vista	2,638	6.8%
Unincorporated	17,941	11.5%
Region	**170,757**	**10.6%**

Takeaways

» As we plan transportation options for the region, it is important to consider the fluctuation we will see over time and include flexibility, such as policies, programs, and projects that can be modified to best meet the needs of the population.

» An aging population translates to a need for the region to meet the needs of older individuals, at the same time the school-age population will be decreasing.

» Even though population growth is slowing, there is pent up demand for housing, and an older population means that the average household size will be smaller, supporting continued emphasis on housing production for residents.

About SANDAG InfoBits

SANDAG serves as the region's clearinghouse for information and data. InfoBits publish timely, relevant information to the public while providing context on complex issues facing the region.