

August 2011

South and East San Diego County

2011 Comprehensive Economic Development Strategy

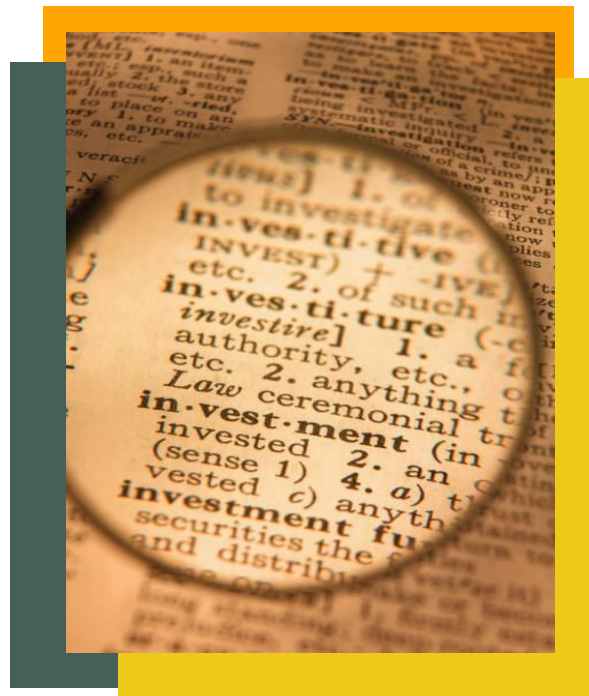


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Executive Summary

In this age of globalization and rapid change, economic development issues become magnified. Regions must contend with the lack of and/or aging infrastructure, the need to serve the existing business base and attract new business, the necessity to upgrade and expand workforce skills, overcome environmental concerns, inadequate budgets, and diminishing fiscal resources.

Recognizing the importance of addressing these issues, representatives from South and East San Diego County joined together to create a Comprehensive Economic Development Strategy (CEDS). The CEDS is designed to bring together the public and private sectors in order to create strategies that maximize the synergy and opportunities of the CEDS Study Area. This report identifies the demographic and economic challenges facing the area and provides a strategy to meet these challenges and improve the competitiveness of the area.

The CEDS Study Area consists of the southern and eastern portions of San Diego County. Its 2010 population is estimated at approximately 1,477,707 representing almost half (47.74 percent) of the entire San Diego region (population 3,095,393). The population of the CEDS Study Area is 4 percent of California's population (37,253,956). Approximately 41 percent of the population of the CEDS area is of Hispanic origin compared to 37.6 percent for California.

The study revealed important challenges faced by the area. The number of families in the CEDS Study Area that live below the poverty level is about 34,482, which is 11.1 percent. This compares to the 9.8 percent in the State of California and 9.9 percent for the U.S.

The median household income is \$61,496, which is lower than the statewide level of \$68,909 and lower than the national level of \$62,363. The CEDS Study Area Per Capita Income (PCI) is \$25,669, which is lower than the PCI of \$29,020 for the State of California, the San Diego County PCI of \$30,705, and the U.S. PCI of \$27,041 (see Appendix 12).

In addition, adults in the CEDS Study Area are not as well educated as the average adult in California, particularly in terms of higher education. Approximately 33.3 percent of the adult population has completed a four-year degree or higher, compared to 37.4 percent statewide and 34.9 percent nationally.

The study area also has unemployment rates that are considered to be relatively high. While the unemployment rate in San Diego County has historically ranked among the lowest in California. This is no longer the case. According to the American Community Survey from 2005 to 2009, the average unemployment rate for the CEDS area was 7.5 percent compared with San Diego County 6.7 percent, and the State of California unemployment rate was 7.9 percent. According to the American Community Survey from 2005 to 2009, the national unemployment rate was 7.2 percent. Pockets of high unemployment still exist and are primarily located in the CEDS Study Area. According to the American Community Survey between 2005 and 2009, the unemployment rates for two of the cities in the CEDS Study area with the highest unemployment rates were 10.8 percent in National City and 9.2 percent in El Cajon respectively (see Appendix 12). As indicated

on the CEDS map, a large portion of the CEDS area has high unemployment and below median income (see Fig. 1 below).

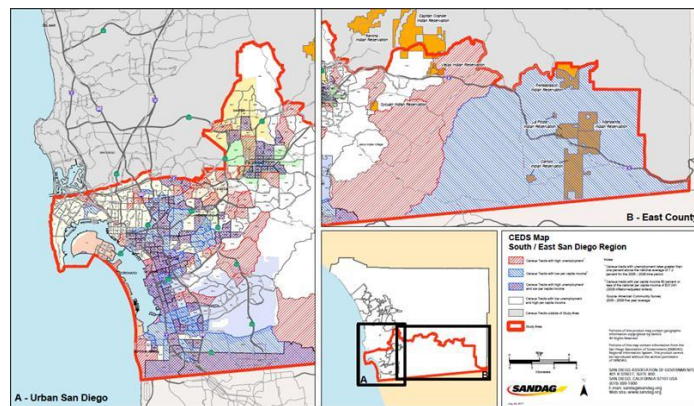
There are a host of common issues that South and East San Diego County contend with that make the area a distinct region. The CEDS Study Area has a complementary employment base, South San Diego County is strong in manufacturing, and East San Diego County is concentrated in defense-related industries. The area's workforce has similar and complementary skill sets that support these industries. The region also shares many infrastructure challenges including an international border that needs major infrastructure investment. The importance of this international border is that products, goods and services travel through the border from different international manufacturing companies in Baja California, Mexico to numerous destinations in the United States of America; as well as the raw materials, human capital, and supplies that travel from the United States of America through the border to different destinations in Mexico. As the internet industry increases its power of selling on-line, the border becomes a critical factor in supply and distribution to deliver products, goods and services on-time to customers in the Republic of Mexico and the United States.

This area's proximity to the U.S. - Mexico border adds a unique aspect to the area's economy that brings with it unique economic development challenges and opportunities. Borders and boundaries become blurred when considering the transportation network, workforce, business markets, social issues and the environment overlay.

MAP

- Three border crossings link the South and East San Diego County with Mexico. The efficient movement of goods and people safely through these ports of entry are critical to the region's economy and provide a competitive advantage.
- Border wait times for commercial traffic at the California-Mexico border are considerably longer than at the Texas-Mexico border or any of the U.S.-Canada border crossings. Delays are responsible for significant economic losses on both sides of the border and are felt at the national, state, and local level due to product and material delivery delays, increased transportation costs, plus interrupted and extended manufacturing cycles.
- According to two different studies, if delays at the ports of entry continue and action is not taken to improve border crossing efficiencies, including transportation infrastructure, delays

Figure 1 - CEDS Study Area Boundaries; Shared elements include commerce, workforce, infrastructure, air and water.



will continue to grow and losses to the regional and national economies will more than double by 2016.¹

- Besides commercial traffic, the ability for people (workers, shoppers, and tourists) to be able to move safely and efficiently across borders is important to the success of all facets of the region's economy including manufacturing, agriculture, retail, recreation, and tourism.
- Access to safe and clean air, water, and soil, as well as the production and distribution of energy are also important issues that transcend borders and must be addressed on a regional and bi-national level.

Recognizing that the pace of change continues to accelerate and that individual communities cannot tackle these complex matters alone, representatives from the study area joined together to create a CEDS. This CEDS is a collaborative effort between South County Economic Development Council (SCEDC), East County Economic Development Council (ECEDC) and the County of San Diego, with support of others agencies and partnering organizations, volunteers, and local jurisdictions. The CEDS identifies regional assets, economic opportunities, challenges, and possible solutions. The CEDS is designed to set in motion a plan for economic prosperity.

In past years, these and many other organizations and individuals have been working effectively to help maintain and improve the economy and quality of life in the region. The objective of this CEDS is not to replace any of the work or plans that are already underway, but to help support and add to the efforts with new opportunities that strong collaboration can make possible.

The overall mission of this CEDS is to bring together the public and private sectors to create strategies that maximize the synergy and opportunities of the CEDS Study Area.

This CEDS includes an Action Plan with specific initiatives designed to mitigate weaknesses and utilize the region's strengths to address economic challenges and sustain a strong economy. It will be used as a guide toward ongoing efforts to fund economic development and infrastructure projects, implement action items, and monitor success.

The overall mission of this CEDS is to bring together the public and private sectors, nonprofits and individuals to create strategies that maximize the synergy and opportunities of the CEDS Study Area including its proximity to the international border. To accomplish this, goals and initiatives are centered on:

- Collaboration and Leadership — Communicating the CEDS vision and goals; building a well-informed regional leadership base and developing on the commonalities between South and East San Diego County.
- Business Development and Entrepreneurship — capturing opportunities in the CEDS Study Area for: supporting and advancing entrepreneurship, home-based businesses, and tourism opportunities; expanding existing and developing new and emerging industries that

¹ Sources: Economic Impacts of Wait Times at the San Diego-Baja California Border (January 19, 2006); San Diego Association of Governments California Department of Transportation, District 11.

will offer long-term employment, jobs with career ladders and good wages. Some examples include medical devices, renewable energies, other advanced manufacturing products, and creative industries.

- Workforce Development and Education — strengthening communication and support between educational institutions and businesses; preparing workers for today’s and tomorrow’s jobs, providing opportunities for youth to gain work skills and experience and improving the population’s educational attainment.
- Infrastructure Development — working to ensure local, state and federal political representatives understand the importance of improving the border region/CEDS Study Area infrastructure; supporting infrastructure improvements within the region that will facilitate commerce, ensuring efficient and secure movement of goods and people, and reduce wait times. The types of infrastructure development that need improvements are international border crossings, roads, highways, regional airports, rail transportation, water, sewer, electrical and communication systems.
- Quality of Life — expanding art, cultural, recreational, and entertainment opportunities; supporting retail and downtown development and renovation; ensuring there are sufficient and diverse housing choices; ensuring the educational, safety, and health needs of a diverse population are met; and provide for sustained communities.

A. Introduction

In October 2008, the South County Economic Development Council (SCEDC) received an Economic Development Administration (EDA) grant to create a Comprehensive Economic Development Strategy (CEDS). SCEDC established a steering committee that encouraged collaboration from a diverse group of representatives from San Diego and Imperial Counties. The CEDS was successfully completed and accepted by both the San Diego and Imperial County Boards of Supervisors and the EDA. However, after a year of effort it has become apparent that the Imperial Valley no longer wishes to participate. This CEDS is a collaborative effort between SCEDC, ECEDC and the County of San Diego, with support of others agencies and partnering organizations, volunteers, and local jurisdictions to identify regional assets, economic opportunities, challenges, and possible solutions. The CEDS is designed to set in motion a plan for economic prosperity.

The South and East San Diego County CEDS region consists of the southern and eastern portions of San Diego County (see Figure 1) and is referred to as the CEDS Study Area throughout the remainder of this document.

Having a CEDS is required to qualify for Economic Development Administration (EDA) assistance for public works and planning projects. There are three basic distress factors that determine the eligibility of an area for EDA assistance – unemployment, low income, and special needs.

The unemployment of the two jurisdictions within the San Diego portion of the CEDS Study Area is of particular concern. National City and El Cajon have consistently higher unemployment rates than the county, the remaining cities in San Diego County, the state and the nation. According to the American Community Survey between 2005 and 2009, the unemployment rates for these two cities were 10.8 percent in National City and 9.2 percent in El Cajon respectively (see Appendix 12).

Median household income in the CEDS Study Area has increased only moderately since 2000. The number of families in the CEDS Study Area that live below the poverty level is about 34,482, which is 11.1 percent. This compares to the 9.8 percent in the State of California and 9.9 percent for the U.S. (see Table 6 and Table 7). The CEDS Study Area Per Capita Income (PCI) is lower than the San Diego County, the State of California and the nation. The CEDS Study Area average PCI is \$25,669 compared to \$30,705 for San Diego County, \$29,020 for the State of California, and \$27,041 at the national level (see Appendix # 12).

The area also has unique circumstances, opportunities and special needs. The CEDS Study Area has many economic development advantages due to its unique location on the U.S.-Mexico border. It also faces challenges in maintaining and expanding the infrastructure because of the extremely high volume of vehicles and pedestrian traffic to ensure the economy can thrive. These challenges include reducing border wait times, expanding commercial and pedestrian lanes, ensuring the public's safety and the safety of the shared environment (air, water, etc). Expanding,

improving, and maintaining the U.S.-Mexico border infrastructure and its national importance are critical to the overall economy of the CEDS Study Area and the nation.

Organization of the Report

While the CEDS is a result of a planning process developed with broad and diverse community participation, to meet EDA requirements it must contain specific elements which can be found in the following sections.

- Section B presents the CEDS Committee and describes the planning process undertaken by the committee and the public's participation.
- Section C summarizes the goals, objectives, and projects outlined in recently completed studies and plans that were reviewed during the development of this CEDS. These documents were completed by a variety of local and regional organizations and have an underlying set of commonalities which reinforce the basis for this joint effort.
- Section D and E provide background information on the current regional economic conditions, industry composition, and the unique factors affecting the CEDS Study Area's economic performance.
- Section F contains the goals, objectives, and action plan of the CEDS. Initiatives within the action plan may be eligible for funding assistance from EDA. The Action Plan was developed in concert with regional leaders from the public and private sector and encompasses the plans and initiatives of a variety of organizations and jurisdictions. Be advised that specific projects will be identified and forwarded to the EDA within the next six to twelve months.
- The Appendix provides useful supplemental information including results of a public survey, industry data and intelligence, and information on potential programs.

B. Public Participation

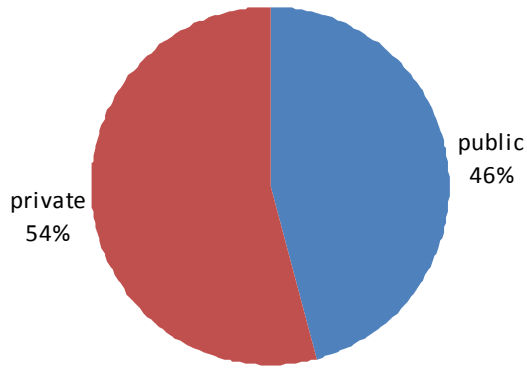
In October 2008 SCEDC received EDA grant funds to create a CEDS. SCEDC established a steering committee that encouraged collaboration from a diverse group representing San Diego and Imperial Counties and solicited participation from a broad range of expertise and diversity. However, when it became apparent that Imperial County did not wish to participate, SCEDC and ECEDC worked with the CEDS members from San Diego County to recreate and augment this CEDS. This effort was a collaborative effort between SCEDC, ECEDC and partnering organizations, volunteers, and local jurisdictions. SCEDC posted CEDS member recruitment announcements on SCEDC's website. Additionally, the draft CEDS with tracked changes has been available on the SCEDC web site for public viewing, since this effort began.

Table 2 - CEDS Committee Members and Demographics

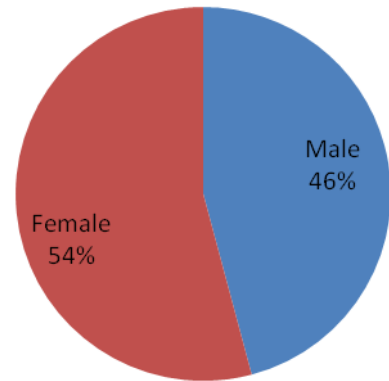
South and East San Diego County CEDS Committee Members			
First Name	Last Name	Type of Company	Private Count
Bill	Tunstall	Private Individual	
Billie Jo	Jannen	Private Sector	1
Carmen	Sandoval	Community Leader	
Cheryl	Mason	Community Leader	
Christina	Luhn	Community Leader	
Christine	Moore	Private Sector	1
Cindy	GompperGraves	Community Leader	
Dana	Quittner	Higher Education	
DeAna	Verbeke	Private Sector	1
Dennis	Berglund	Private Sector	1
Doug	Paul	Private Sector	1
Elsa	Saxod	Private Sector	1
Jim	Janney	Private Sector	1
Jo Marie	Diamond	Community Leader	
John	Minto	Public Official	
Jon	Cloud	Private Sector	1
Juan	Durruthy	Private Sector	1
Kristy	Gregg	Private Sector	1
Nathaniel	Buggs	Workforce	
Randy	Lenac	Community Leader	
Rebecca	Bennion	Minority Labor/Group	
Ricardo	Macedo	Private Sector	1
Rosa	Lopez Gonzalez	Private Sector	1
Tony	Ambrose	Private Sector	1
Total Private Sector		13	54.17%
Grand Total		24	100%

Totals						
Public	Private	Regional	South	East	Male	Female
11	13	5	9	10	11	13
Ethnicity						
White	Hispanic	African American	Asian	Other		
13	6	2	2	1		

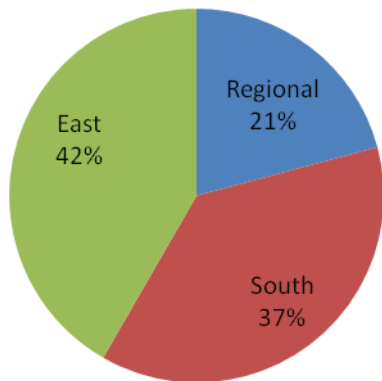
Type of Organization



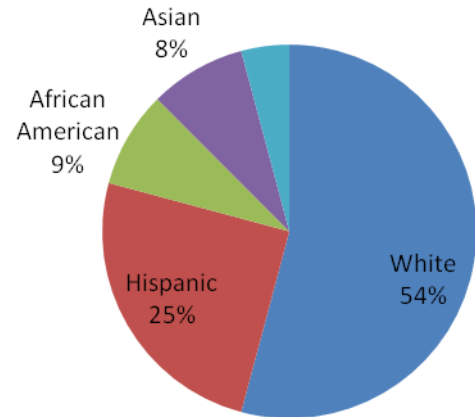
Gender



Location



Ethnicity



Planning Process

The steering committee held their first meeting on March 21, 2011 and regular CEDS committee meetings were held to keep the process moving forward. These meetings were open to the public. The following is a brief synopsis of these meetings:

- ✓ January 2009: An educational meeting for the CEDS committee; the committee heard a presentation on the current economic conditions, what a CEDS is, the process of developing a CEDS and their role in that process.
- ✓ April 2009: The Committee worked in groups to identify the region's commonalities, strengths, weaknesses, opportunities, and threats to the region's economic prosperity.
- ✓ May 2009: The Committee was presented with results of the public survey (survey results are included in the Appendix) and the demographic and economic statistical research that was compiled for the Existing Regional Conditions section of the CEDS.
- ✓ June 2009: Industry research was presented to the Committee which identified the concentration of existing industry sectors, the potential for growth, and identified possible emerging industries. The committee also worked on potential initiatives, action items, and identified additional partners that will help to make the strategy a success.
- ✓ July 2009: The Committee met to review and submit comments on the draft CEDS document in preparation for the public review process.
- ✓ September 2009: The Committee reviewed the draft document and initiated a public review process.
- ✓ October 2009: The Committee reviewed comments, conducted three public workshops and adopted the final CEDS document. It was subsequently submitted to the counties, State and EDA for review and acceptance.
- ✓ December 2009: San Diego County Board of Supervisors adopts the joint CEDS.
- ✓ February 2010: Revision and recreation of CEDS began.
- ✓ March 2010: CEDS meeting occurred.
- ✓ April 2010 through October 2010: Various meetings and phone conversations between Imperial Valley EDC (IVEDC), SCEDC, ECDC, and the County of Imperial regarding processes and rules of engagements to continue with the joint CEDS efforts.
- ✓ October 2010: Decision to create separate CEDS encompassing only South and East San Diego County.
- ✓ November and December 2010: Discussions between SCEDC and ECEDC regarding joint CEDS efforts for South and East San Diego County. Additional, discussions with Board of Directors for SCEDC and ECEDC.
- ✓ 1st Quarter of 2011: Solicitation and reconstitution of new CEDS Committee members for CEDS meeting. Draft CEDS presented.
- ✓ 2nd Quarter of 2011: Additional CEDS Committee meetings. Solicitation of public input on draft CEDS. Draft CEDS continuously updated on SCEDC web site and presented to CEDS Committee members and public for various edits, additions, comments, and

information. Draft CEDS adopted by Board of Supervisors and draft sent to EDA for review.3rd Quarter of 2011: Several conversations with EDA regarding data. Revision to CEDS with new data approved by CEDS Committee.

Table 1 - Summary Timeline of the CEDS Study Area CEDS Planning Process (Calendar Year Quarters)

1Q09	2Q09	3Q09	4Q09
Steering committee formed. CEDS committee formed. Public education Research.	Where are we now? Understanding current economic conditions. Where do we want to go? Vision, Goals, Assets. How do we get there? Regional Initiatives, Performance Measures.	First draft CEDS created and reviewed. Comments submitted by CEDS Committee members. Second draft CEDS created and reviewed.	Public Workshops conducted. Final CEDS presented to CEDS Committee. CEDS adopted by San Diego County Supervisors and sent to other entities.

1Q10	2Q10	3Q10	4Q10
Recreation of CEDS began. Restructuring of CEDS Committee. Meeting of new CEDS committee.	Meetings with Imperial Valley and the East County Economic Development Council regarding the implementation and governing policies of CEDS.	Meetings with Imperial Valley and the East County Economic Development Council regarding the implementation and governing policies of CEDS.	Meeting with CEDS partners regarding the creation of CEDS with SCEDC and ECEDC. Presentation to SCEDC and ECEDC Boards of Directors regarding the recreation of CEDS.

1Q11	2Q11	3Q11	4Q11
Reconstitute CEDS Committee for SCEDC and ECEDC areas only. Create new map with new boundaries for CEDS area. Begin gathering demographics information and rewriting CEDS. CEDS Committee meeting. Post vacancy seats for CEDS Committee.	CEDS Committee Meetings. Review CEDS document, edit and write new CEDS document. Review draft CEDS document. Post meetings announcements, agenda, minutes, and CEDS Committee vacancy notice. Post draft CEDS. Presentation to SANDAG Committee	Approved by Board of Supervisors. Draft submitted to EDA. Revised CEDS approved by CEDS Committee. Send final CEDS document to EDA.	Develop process for project submission and consideration. CEDS Committee meeting. Begin to review and assess projects for support.

The CEDS Study Area is fortunate to have the support of many organizations representing a broad range of perspectives involved in the planning and implementation of the CEDS (See Table 2).

Table 2 - Organizational Resources for the South and East San Diego County

Organizational Resources	Organization's Function and/or CEDS Area of Interest						
	Planning, Economic & Business Dev.	Financing & Venture Capital	R&D and Innovation	Business Assistance	Training and Education	Border Issues	Transportation & Infrastructure
Local communities	◆	◆		◆			◆
San Diego County Association of Governments	◆					◆	◆
San Diego Workforce Partnership, Inc.	◆				◆		
Grossmont-Cuyamaca Community College District.			◆		◆		
Cali Baja Bi-National Mega-Region Advisory Board	◆						
Chambers of Commerce / Visitors' Bureaus	◆						
CleanTECH San Diego			◆				
Economic Development Corporations and Organizations	◆	◆		◆	◆	◆	◆

Public Participation

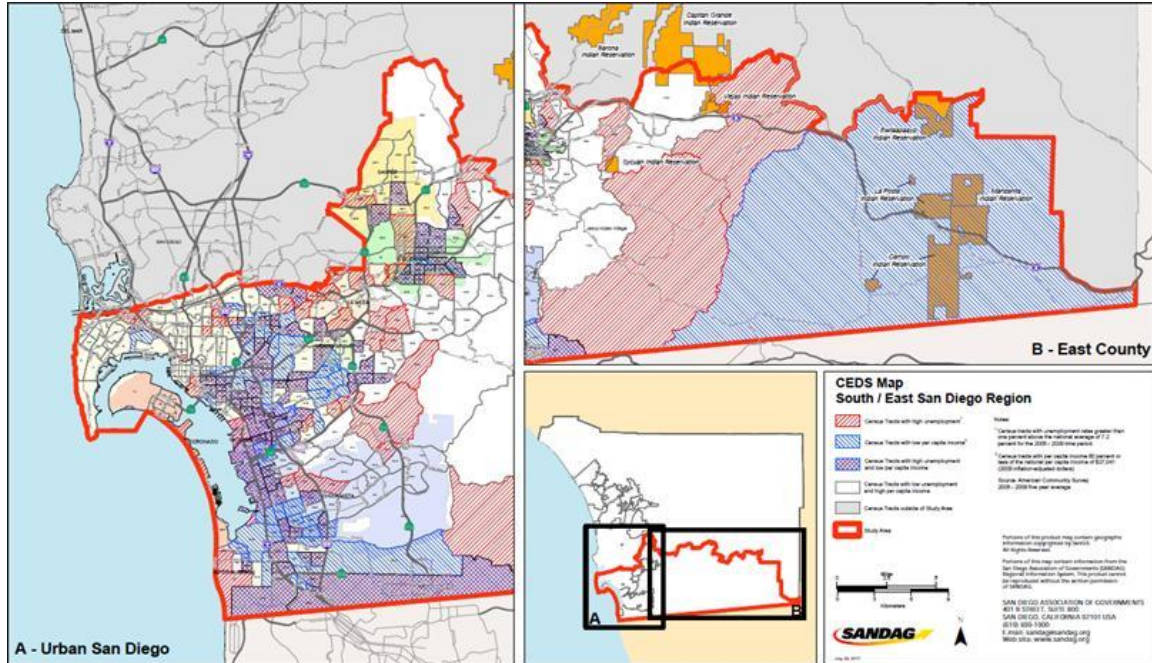
Public input was solicited early in the development of the CEDS through media coverage, public meetings, online survey, and personal interviews when developing the South and East San Diego County CEDS.² This revised CEDS has encouraged further participation by utilizing the existing documentation and making changes as recommended by the committee and through various presentations through members of the CEDS committee.

To promote public involvement, the SCEDC established a CEDS page on their website. The page includes: list of committee members, meeting notices, agendas, minutes, and member recruitment. Regional areas of interest include: education and workforce training, transportation and other infrastructure, energy, jobs/housing, the international border, building a sustainable economy, and maintaining a high quality of life. The CEDS committee considered these areas as it crafted the vision, goals, and strategies.

C. Existing Conditions of the CEDS Study Area

The South and East San Diego County CEDS region (CEDS Study Area) consists of the southern and eastern portions of San Diego County. The CEDS northern boundary runs from the coast eastward roughly along Interstate 8 to the San Diego/Imperial County line. The southern boundary is the international border between the U.S. and Mexico (Figure 1).

Figure 1 - CEDS Study Area Boundaries



Geography and Land Use

The CEDS Study Area consists of approximately 704,421 square miles and a variety of geographic conditions including mountains, canyons, the Pacific Ocean, and the Tijuana River Valley. It contains a mix of rural, suburban and urban areas, tribal lands, open and recreational space uses.

Table 3 - Summary of CEDS Study Area Land Uses, 2010

Land Use: ³	Ind/Com	Res.	Farm	Rec.	Water	Gov / Military	Other	Open Space	Total
Acres	57,547	129,727	13,276	10,049	17,399	4864	275,635	195,924	704,421
% of Total	8.20%	18.40%	1.90%	1.40%	2.50%	0.70%	39.10%	27.80%	100.00%

Source: The San Diego Association of Governments (SANDAG)

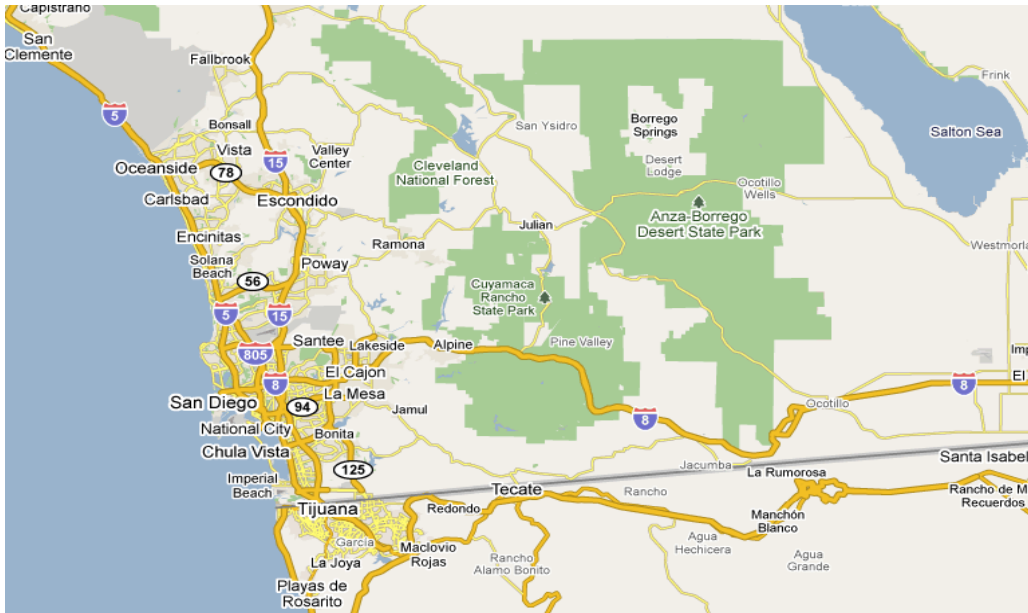
³ Residential: single and multi-family dwellings, dorms and other group quarters; Recreation: local parks, tourist attractions, entertainment centers, casinos, marinas, etc.; Water: lakes, reservoirs, ocean; Other: hospitals, schools, vacant/undeveloped land, public lands, open space and Tribal lands.

Highway Transportation Network

The CEDS Study Area's highway transportation network consists of Interstates, State Highways, and a host of regional arterials (see Figure 2). This network of roadways provides local, national, and international connectivity for the movement of goods, services, and people throughout the region and between the U.S. and Mexico. Efficient and safe travels on these highways are especially important to the success and sustainability of the CEDS Study Area economy.

- Interstate 5 is the primary north-south transportation corridor in the western United States. It begins in the southwestern portion of the CEDS Study Area U.S.-Mexico border and the San Ysidro Port of Entry. It heads north across the length of California before crossing into Oregon.
- Interstate 8 is the primary east-west transportation corridor between South and East San Diego County. The interstate begins just west of I-5 in San Diego County, and heads east. It intersects with Interstates 5, 15, and 805, and Highways 163, 125, and 67 before heading into the Cleveland National Forest.
- Interstate 15 is a major thoroughfare for traffic between Southern California, Las Vegas, and beyond. Starting at I-5 it runs north through San Diego County and beyond. It is a major long-haul route for North American commerce.
- Interstate 805, a bypass of I-5, is one of two north-south freeways that reach Mexico and is a major north-south commuter corridor in Southern California. It runs along the eastern portion of the CEDS Study Area starting in San Ysidro at the U.S.-Mexico border, goes through the cities of Chula Vista, National City and San Diego.
- Highway 54 connects I-5 to the City of El Cajon. Starting at I-5 in National City and going eastward to El Cajon, the highway provides connections to I-8, I-805, and SR-125.
- Highway 75 is a short but scenic loop expressway that begins just north east of Imperial Beach at I-5, heads north along Silver Strand State Beach, through Coronado, and turns east passing over the San Diego Bay (San Diego-Coronado Bay Bridge) and meets up again with north and south bound I-5.
- Highway 94, which is a historic highway, is an east-west running highway that spans SR-54 to I-5 and intersects with I-15, I-805, SR-125, SR-94, and SR-54.
- Highway 163, in the western portion of the CEDS Study Area, is a short connecting highway between I-5 and I-15.
- Highway 905/Otay Mesa Road runs from I-5 to the U.S.-Mexico border at Otay Mesa. The Otay Mesa Port of Entry is the largest commercial crossing on the California/Mexico border.
- State Route 125 runs from SR-905 in Otay Mesa near the U.S.-Mexico border to SR-52 in Santee (north of El Cajon). The southern portion of SR-125 (aka South Bay Expressway) is a toll road funded by California Transportation Ventures, Inc., a private company, and U.S. Department of Transportation, Caltrans, San Diego Association of Governments, and the City of Chula Vista.

Figure 2 - CEDS Study Area Highway Transportation Network



U.S.-Mexico Border Ports of Entry

San Diego County

- San Ysidro Port of Entry, where U.S. I-5 crosses into Mexico at Tijuana, is the busiest land border crossing in the world and is open 24 hours a day serving pedestrian and passenger vehicles. Many of the people crossing the border (mostly of U.S. and Mexican nationality) are commuting to jobs in the CEDS Study Area, the greater San Diego area, and throughout southern California. There is also a reverse commute of workers traveling from the U.S. to the maquiladoras and other businesses in Mexico.
- Otay Mesa Port of Entry handles commercial trucks, passenger vehicles, and pedestrian crossings. Passenger vehicles and pedestrian crossings occur 24 hours a day while commercial facilities operate at reduced hours.
- Tecate Port of Entry provides service to pedestrian, passenger vehicles, commercial vehicles, and previously rail. It is directly adjacent to the City of Tecate in Mexico.
- Planned ports of entry include an additional port of entry in Otay Mesa known as “Otay 2”. This crossing has received Presidential approval and is waiting funding.
- There is another port of entry that appears on several planning documents in Jacumba. This port of entry will assist with crossing in the eastern part of the County, but is not yet approved or funded.

Population

Unlike some parts of California, population in the CEDS Study Area has grown since 1990 at an average annual growth rate of 8.4 percent (see Table 5). This translates into about 212,726 new residents over the past 20 years. In contrast, the statewide average annual growth rate since 2000 has been about 10 percent. Local growth is projected to continue, with total population of San Diego County projected to be 4.3 million by 2050.⁴

Population movement often varies and is impacted by economic conditions, including the cost of housing. For example, in San Diego County close to 60 percent of the growth was from net migration until about 2003 when in-migration began to decline sharply as housing prices increased. In 2006 net migration was actually positive. Of those migrating, domestic migration was negative and international migration was positive. Then, as housing prices dropped in recent years and affordability increased, net migration as a share of total growth began to rise again in 2007 and 2008 to about 41 percent.

This CEDS area is diverse in race and ethnicity. The CEDS Study Area has a sizeable Hispanic population, 41 percent compared to 37 percent statewide and 16 percent nationwide. People with Asian ethnicity comprised 9 percent of the CEDS area compared to 12 percent at the state level and 4 percent at the federal level. African Americans comprised 7 percent of the CEDS population, 5 percent of the state and 12 percent of the national. The U.S. census bureau report of white alone comprised of 38 percent of the CEDS population, 40 percent of California's population and 63 percent of the United States population. About 31.8 percent of the people in the CEDS Study Area speak Spanish at home, which is higher than the state (28.2 percent) and much higher than the nation (12.1 percent).

⁴ Reference SANDAG Growth Projections

Table 4 - Population Growth & Characteristics of the CEDS Study

Total Population	CEDS Study Area	CEDS Study Area	California	California	United States	United States
Year	Population	Percent Change	Population	Percent Change	Population	Percent Change
1990	1,264,981	-	29,760,021	-	248,709,873	-
2000	1,363,650	7.8%	33,871,648	13.8%	281,421,906	13.2%
2010	1,477,707	8.4%	37,253,956	10.0%	308,745,538	9.7%

Source: U.S. Census Bureau, 1990, 2000, and 2010 Decennial Census, Summary Table File STF-1 and DP-1 - 100-Percent Data, Data Compiled by SANDAG.

Depicts SANDAG Population Estimate Forecasts

By Age (2010)	CEDS Study Area	CEDS Study Area	California	California	United States	United States
	Population	Distribution	Population	Distribution	Population	Distribution
19 and Under			10,452,042	28.1%	83,267,556	27.0%
19 to 24			2,765,949	7.4%	21,585,999	7.0%
25 to 34			5,317,877	14.3%	62,649,947	20.3%
35 to 54			10,435,081	28.0%	86,077,322	27.9%
55 to 64			4,036,493	10.8%	36,482,729	11.8%
65 and Over			4,246,514	11.4%	40,267,984	13.0%
Median Age				35.2		37.2

Source: U.S. Census Bureau, 2010 Decennial Census, Summary Table File STF 1 - 100-Percent data, Data Compiled by SANDAG.

By Race and Ethnicity (2010)	CEDS Study Area	CEDS Study Area	California	California	United States	United States
	Population	Distribution	Population	Distribution	Population	Distribution
White Alone	566,314	38.3%	14,956,253	40.1%	196,817,552	63.7%
Black or African-American Alone	105,484	7.1%	2,163,804	5.8%	37,685,848	12.2%
American Indian and Alaskan Native Alone	5,859	0.4%	162,250	0.4%	2,247,098	0.7%
Asian Alone	140,248	9.5%	4,775,070	12.8%	14,465,124	4.7%
Native Hawaiian and Other Pacific Islander Alone	7,077	0.5%	128,577	0.3%	481,576	0.2%
Hispanic or Latino Alone	606,166	41.0%	14,013,719	37.6%	50,477,594	16.3%
Some Other Race	3,029	0.2%	85,587	0.2%	604,265	0.2%
Two or More Races	43,530	2.9%	968,696	2.6%	5,966,481	1.9%

Source: U.S. Census Bureau, 2010 Decennial Census, Summary Table P1, P2, P3, P4, H1 - 100-Percent data, Data Compiled by SANDAG.

Primary Language Spoken at Home over 5 Years of Age (2009)	CEDS Study Area	CEDS Study Area	California	California	United States	United States
	Population	Distribution	Population	Distribution	Population	Distribution
Speak only English	751,446	57.8%	19,409,485	57.8%	225,710,244	80.4%
Spanish or Spanish Creole	413,853	31.8%	9,462,163	28.2%	34,056,675	12.1%
Other	134,794	10.4%	4,736,894	14.1%	20,834,270	7.4%

Source: U.S. Census Bureau, 2005-2009 American Community Survey, B16001.

The CEDS Study Area is comprised of married couple families with or without related children under the age of 18 that make up 69.5 percent of the total households. Female and male households with children are 19.7 percent, 11.1 percent of the households in the CEDS Study Area live below the poverty level compared to the state level of 9.8 percent and the national level at 9.9 percent. Additionally, married couple families with no related children under the age of 18 whose income levels are at or above poverty level comprise 32.8 percent of the CEDS Study Area, compared to 34 percent at the state level and 39.3 percent at the national level (see Table 5).

Poverty Level

The number of families in the CEDS Study Area that live below the poverty level is about 11.1 percent, which is higher than the state (9.8 percent) and the nation (9.9 percent). The proportion of families living below the poverty level varies significantly within the CEDS Study Area. The largest proportions of families living in poverty are married couple families with children (3.3 percent) and single mothers with children (5 percent), which is also true of the state and nation (see Table 6).

In 2009, family households in the CEDS Study Area totaled 310,724. Median income for these family households is \$61,496 which is lower than the median household income for the state of California (\$68,909)⁵ and the United States (\$62,363).

Table 5 - Family Household by Income of the CEDS Study Area

**2005-2009 American
Community Survey 5-
Year Estimates**

Family Households by Income (In 2009 inflation-adjusted dollars)	CEDS Study Area	CEDS Study Area	California	California	United States	United States
	Population	Distribution	Population	Distribution	Population	Distribution
Total	310,724		8,333,690		75,082,471	
Less than \$10,000	13,122	4.2%	315,775	3.8%	3,393,200	4.5%
\$10,000 to \$19,999	25,602	8.2%	589,573	7.1%	5,443,067	7.2%
\$20,000 to \$29,999	28,585	9.2%	710,723	8.5%	6,784,015	9.0%
\$30,000 to \$39,999	30,085	9.7%	709,310	8.5%	7,088,789	9.4%
\$40,000 to \$49,999	28,388	9.1%	674,953	8.1%	6,859,170	9.1%
\$50,000 to \$59,999	26,214	8.4%	637,242	7.6%	6,512,435	8.7%
\$60,000 to \$74,999	33,743	10.9%	861,528	10.3%	8,669,557	11.5%
\$75,000 to \$99,999	45,353	14.6%	1,150,905	13.8%	10,997,786	14.6%
\$100,000 to \$149,999	49,046	15.8%	1,429,419	17.2%	11,350,903	15.1%
\$150,000 or more	30,586	9.8%	1,254,262	15.1%	7,983,549	10.6%
Median Family Income in the Past 12 Months		\$61,496		\$68,909		\$62,363

Source CEDS Study Area: SANDAG estimates based on U.S. Census Bureau, 2005-2009 American Community Survey. U.S. Census Bureau, 2005-2009 American Community Survey, B19101.

⁵ "Household" refers to an occupied housing unit. "Family household" refers to households with two or more related persons.

Table 6 - Family Household by Poverty Status of the CEDS Study Area

Family Households by Poverty Status	CEDS Study Area	CEDS Study Area	California	California	United States	United States
	Population	Distribution	Population	Distribution	Population	Distribution
Income in the past 12 months at or above poverty level	276,242	88.9%	7,513,902	90.2%	67,677,189	90.1%
Married-couple family, with related children under 18 years	100,457	32.3%	2,898,529	34.8%	23,797,482	31.7%
Married-couple family, no related children under 18 years	101,800	32.8%	2,830,006	34.0%	29,495,427	39.3%
Male householder, with related children under 18 years	12,337	4.0%	327,874	3.9%	2,378,605	3.2%
Male householder, no related children under 18 years	11,079	3.6%	284,287	3.4%	2,023,811	2.7%
Female householder, with related children under 18 years	31,018	10.0%	694,982	8.3%	6,030,147	8.0%
Female householder, no related children under 18 years	19,551	6.3%	478,224	5.7%	3,951,717	5.3%
Income in the past 12 months below poverty level	34,482	11.1%	819,788	9.8%	7,405,282	9.9%
Married-couple family, with related children under 18 years	10,363	3.3%	263,336	3.2%	1,706,740	2.3%
Married-couple family, no related children under 18 years	3,454	1.1%	93,223	1.1%	974,951	1.3%
Male householder, with related children under 18 years	2,328	0.7%	69,899	0.8%	546,317	0.7%
Male householder, no related children under 18 years	788	0.3%	18,759	0.2%	166,499	0.2%
Female householder, with related children under 18 years	15,452	5.0%	329,343	4.0%	3,549,144	4.7%
Female householder, no related children under 18 years	2,097	0.7%	45,228	0.5%	461,631	0.6%

Source: U.S. Census Bureau, 2005-2009 American Community Survey, B17010.

Income Measures

Overall the median household income and distribution of the incomes in the CEDS Study Area is below the national level and significantly less than the state level (see Table 7).

Table 7 - Household Incomes of the CEDS Study Area (2005-2009 American Community Survey 5-Year Estimates)

Household Income (In 2009 inflation-adjusted dollars)	CEDS Study Area	CEDS Study Area	California	California	United States	United States
	Population	Distribution	Population	Distribution	Population	Distribution
Total Number of Households	480,573		12,187,191		112,611,029	
Less than \$10,000	27,666	5.8%	648,213	5.3%	8,329,488	7.4%
\$10,000 to \$19,999	54,556	11.4%	1,196,044	9.8%	12,329,471	10.9%
\$20,000 to \$29,999	50,471	10.5%	1,153,123	9.5%	12,172,855	10.8%
\$30,000 to \$39,999	48,514	10.1%	1,094,110	9.0%	11,562,211	10.3%
\$40,000 to \$49,999	45,642	9.5%	1,022,167	8.4%	10,462,383	9.3%
\$50,000 to \$59,999	40,447	8.4%	945,136	7.8%	9,385,944	8.3%
\$60,000 to \$74,999	50,055	10.4%	1,223,969	10.0%	11,667,169	10.4%
\$75,000 to \$99,999	62,510	13.0%	1,564,337	12.8%	13,853,787	12.3%
\$100,000 to \$149,999	61,855	12.9%	1,817,134	14.9%	13,578,721	12.1%
\$150,000 or more	38,857	8.1%	1,522,958	12.5%	9,269,000	8.2%
Median Household Income		\$53,322		\$60,392		\$51,425
Per Capita Income in the Past 12 Months		\$25,669		\$29,020		\$27,041

Source CEDS Study Area: SANDAG estimates based on U.S. Census Bureau, 2005-2009 American Community Survey, B19001.

Housing Characteristics

The CEDS Study Area has an approximately 50.4 percent distribution of owner occupied and 49.6 percent of renter occupied units (see Table 8). However, the percentage of owner-occupied homes is nearly 7 percentage points lower than the state (58 percent) and nearly 17 percentage points below the nation (67 percent).

A relatively high share of renter occupied units is generally an indication of housing affordability issues which is evident when looking at the poverty levels and median income levels in the previous tables and the high median housing value of \$457,941 in the CEDS Study Area compared with \$185,400 at the national level.

Another indicator of affordability is that only 38 percent of the housing inventory is made up of single family detached units, less than both the state (57.9 percent) and the nation (66.9 percent). Renter occupied housing units are disproportionately larger in the CEDS Study Area supporting the statistics of the owner occupied housing units. Renter occupied housing units comprised 49.6 percent of the total occupied housing units, dramatically larger than the 33.1 percent at the federal level and the 42.1 percent at the state level. The high number of renters is directly attributed to the high housing cost that exists in the CEDS Study Area.

The age of the housing units is very similar to the state and the nation. Estimates indicate that only 9.5 percent of the housing units in CEDS Study Area were built in the last eleven years. The median year built is 1972 for the CEDS Study Area and 1973 for the State. More than a quarter of the aging housing stock was built before 1960.

Table 8 - Housing Characteristics of the CEDS Study Area

2005-2009 American Community Survey 5-Year Estimates

Housing Units by Tenure	CEDS Area	CEDS Area	California	California	United States	United States
	Estimate	Distribution	Estimate	Distribution	Estimate	Distribution
Total Number of Housing Units	522,609		13,268,682		127,699,712	
Total Number of Occupied Units	480,573	92.0%	12,187,191	91.8%	112,611,029	88.2%
Owner Occupied Housing Units	242,068	50.4%	7,061,432	57.9%	75,320,422	66.9%
Renter Occupied Housing Units	238,505	49.6%	5,125,759	42.1%	37,290,607	33.1%
Average Length of Residence		--		--		--

Source: U.S. Census Bureau, 2005-2009 American Community Survey (ASC), B25001. HOUSING UNITS - Universe: HOUSING UNITS, B25003. TENURE - Universe: OCCUPIED HOUSING UNITS, Data Compiled by SANDAG.

Tenure by Units in Structure for Occupied Housing Units	CEDS Area	CEDS Area	California	California	United States	United States
	Estimate	Distribution	Estimate	Distribution	Estimate	Distribution
Total Occupied Housing Units	480,573		12,187,191	100.0%	112,611,029	100.0%
Owner-Occupied Housing Units	242,068	50.4%	7,061,432	57.9%	75,320,422	66.9%
1 Unit Detached	183,485	38.2%	5,771,441	47.4%	61,446,235	54.6%
1 Unit Attached	18,756	3.9%	515,052	4.2%	4,376,503	3.9%
2 Units	1,448	0.3%	51,364	0.4%	1,048,903	0.9%
3 or 4 Units	3,979	0.8%	83,526	0.7%	686,052	0.6%
5 to 9 Units	4,863	1.0%	81,024	0.7%	602,153	0.5%
10 to 19 Units	3,428	0.7%	56,039	0.5%	472,426	0.4%
20 to 49 Units	3,544	0.7%	57,240	0.5%	504,434	0.4%
50 Units or more	7,630	1.6%	80,858	0.7%	890,874	0.8%
Mobile home	14,583	3.0%	354,037	2.9%	5,223,129	4.6%
Other	352	0.1%	10,851	0.1%	69,713	0.1%
Renter-Occupied Housing Units:	238,505	49.6%	5,125,759	42.1%	37,290,607	33.1%
1 Unit Detached	55,097	11.5%	1,393,353	11.4%	9,652,328	8.6%
1 Unit Attached	17,089	3.6%	351,854	2.9%	2,167,509	1.9%
2 Units	10,610	2.2%	248,192	2.0%	3,160,400	2.8%
3 or 4 Units	21,994	4.6%	592,540	4.9%	4,171,495	3.7%
5 to 9 Units	35,334	7.4%	661,175	5.4%	4,638,557	4.1%
10 to 19 Units	32,654	6.8%	574,457	4.7%	4,313,034	3.8%
20 to 49 Units	25,761	5.4%	537,200	4.4%	3,176,780	2.8%
50 Units or more	35,696	7.4%	653,860	5.4%	4,218,995	3.7%
Mobile home	3,960	0.8%	106,940	0.9%	1,758,187	1.6%
Other	310	0.1%	6,188	0.1%	33,322	0.0%

Source: U.S. Census Bureau, 2005-2009 American Community Survey, B25032. TENURE BY UNITS IN STRUCTURE - Universe: OCCUPIED HOUSING UNITS, Data Compiled by SANDAG.

Housing Values by Owner-Occupied Housing Units	CEDS Area	CEDS Area	California	California	United States	United States
	Estimate	Distribution	Estimate	Distribution	Estimate	Distribution
Total Owner-Occupied Housing Units	242,068		7,061,432		75,320,422	
Less than \$149,999	20,553	8.5%	606,492	8.6%	29,777,337	39.5%
\$150,000 to \$199,999	6,299	2.6%	295,184	4.2%	10,510,496	14.0%
\$200,000 to \$249,999	11,153	4.6%	408,318	5.8%	7,855,354	10.4%
\$250,000 to \$299,999	12,699	5.2%	381,422	5.4%	4,963,568	6.6%
\$300,000 to \$399,999	41,132	17.0%	1,036,574	14.7%	7,897,578	10.5%
\$400,000 to \$499,999	50,392	20.8%	1,014,099	14.4%	4,756,081	6.3%
\$500,000 to \$749,999	66,093	27.3%	1,837,576	26.0%	5,703,850	7.6%
\$750,000 to \$999,999	20,976	8.7%	807,577	11.4%	2,054,948	2.7%
\$1,000,000 or more	12,771	5.3%	674,190	9.5%	1,801,210	2.4%
Median Housing Value		\$457,941		\$479,200		\$185,400

Source: U.S. Census Bureau, 2005-2009 American Community Survey, B25075. VALUE - Universe: OWNER-OCCUPIED HOUSING UNITS, B25077. MEDIAN VALUE (DOLLARS) - Universe: OWNER-OCCUPIED HOUSING UNITS, Data Compiled by SANDAG.

Housing Units by Year Structure Built	CEDS Area	CEDS Area	California	California	United States	United States
	Estimate	Distribution (%)	Estimate	Distribution	Estimate	Distribution
Total Housing Units	522,609		13,268,682		127,699,712	
Built 2005 or later	10,916	2.1%	325,449	2.5%	3,708,567	2.9%
Built 2000 to 2004	38,542	7.4%	931,873	7.0%	10,774,495	8.4%
Built 1990 to 1999	41,571	8.0%	1,420,886	10.7%	18,111,220	14.2%
Built 1980 to 1989	79,543	15.2%	2,099,139	15.8%	18,335,229	14.4%
Built 1970 to 1979	117,359	22.5%	2,496,321	18.8%	21,289,228	16.7%
Built 1960 to 1969	77,598	14.8%	1,887,117	14.2%	14,784,435	11.6%
Built 1950 to 1959	81,498	15.6%	1,909,953	14.4%	14,662,154	11.5%
Built 1940 to 1949	32,750	6.3%	897,388	6.8%	7,601,471	6.0%
Built 1939 or earlier	42,832	8.2%	1,300,556	9.8%	18,432,913	14.4%
Median Year Built		1972		1973		1974

Source: U.S. Census Bureau, 2005-2009 American Community Survey, B25034. YEAR STRUCTURE BUILT - Universe: HOUSING UNITS, B25035. MEDIAN YEAR STRUCTURE BUILT - Universe: HOUSING UNITS, Data Compiled by SANDAG.

Between December 2008 and February 2009, some San Diego communities including La Mesa, Santee and San Diego saw small increases in home prices. It remains to be seen whether this recovery trend will continue. Other areas like Chula Vista and National City have continued to decline in recent months (see Table 9). The CEDS Study Area has been particularly hard hit with the reduction of housing value. The East side of Chula Vista, where young families bought newer homes, saw a substantial decrease in the value of their homes. Additionally, National City, an economically challenged city, saw a decline of 64 percent from 2006 to 2009. While further decline has slowed during 2010 and the first portion of 2011, median housing prices have not achieved previous levels.

Table 9 - Median Housing Price in Selected CEDS Study Area Communities

Community	Value Dec-06	Value Dec-07	Change 2006-07	Value Dec-08	Change 2007-08	Value Feb-09	Change 2006-09
Chula Vista	\$525,000	\$400,000	-24%	\$316,500	-21%	\$275,500	-48%
El Cajon	\$437,000	\$329,500	-25%	\$215,750	-35%	\$320,000	-27%
La Mesa	\$454,500	\$390,000	-14%	\$337,500	-13%	\$350,000	-23%
Lemon Grove	\$410,000	\$349,500	-15%	\$245,000	-30%	\$242,500	-41%
National City	\$435,000	\$340,000	-22%	\$225,000	-34%	\$155,000	-64%
San Diego	\$475,000	\$475,000	0%	\$307,000	-35%	\$310,000	-35%
Santee	\$427,000	\$385,500	-10%	\$270,000	-30%	\$280,500	-34%

Table 10 – Foreclosures

Foreclosure rates in the CEDS Study Area are relatively high when compared to the state as a whole (see Figure 3) and are concentrated in five CEDS Study Area jurisdictions. The eight locations in the CEDS Study Area with the most foreclosures as of August 5, 2009 are:

- Chula Vista (4,538)
- El Cajon (1,565)
- Spring Valley (1,238)
- National City (859)
- La Mesa (697)
- Santee (566)
- Lakeside (506)
- Lemon Grove (397)

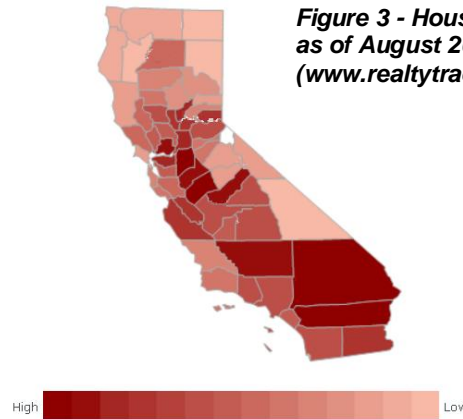


Figure 3 - Housing Foreclosures as of August 2009
(www.realtytrac.com)

In April 2011, there were 884 foreclosures (see Table 10) in the CEDS Study Area. This results to 30.82 percent of San Diego County’s foreclosures in April. At the beginning of the nation’s foreclosure crisis, Chula Vista was in the top 10 cities with the highest foreclosures rates and at one time ranked the number one city with the largest foreclosures. As Table 10 indicates, foreclosures continue at a high rate in the economically challenged areas of our region.

Labor Force and Unemployment

Table 11 – Annual Average Unemployment 2000-2010

CEDS Study Area, San Diego County and California											
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
CEDS Study Area											
Civilian Labor Force	--	--	--	--	--	--	--	--	--	711,150	734,260
Civilian Employment	--	--	--	--	--	--	--	--	--	634,500	640,560
Civilian Unemployment	--	--	--	--	--	--	--	--	--	76,640	93,700
Civilian Unemployment Rate	--	--	--	--	--	--	--	--	--	10.8%	12.8%
San Diego County											
Civilian Labor Force	1,376,000	1,409,700	1,450,500	1,468,200	1,484,200	1,492,600	1,499,900	1,518,300	1,547,300	1,553,500	1,557,500
Civilian Employment	1,322,200	1,350,700	1,375,800	1,391,700	1,413,900	1,427,900	1,440,400	1,449,500	1,455,100	1,403,900	1,393,200
Civilian Unemployment	53,800	59,000	74,700	76,500	70,300	64,700	59,400	68,900	92,300	149,600	164,300
Civilian Unemployment Rate	3.9%	4.2%	5.2%	5.2%	4.7%	4.3%	4.0%	4.5%	6.0%	9.6%	10.6%
State of California											
Civilian Unemployment Rate	4.9%	5.4%	6.7%	6.8%	6.2%	5.4%	4.9%	5.3%	7.2%	11.3%	12.4%
California and County Source: California Employment Development Department, compiled by SANDAG											
CEDS Study Area Source: 2005-2009 ACS, compiled by SANDAG											

The unemployment rates for San Diego County as a whole followed the State of California very closely (see Figure 4 and Table 12).

Several census tracts within the San Diego County portion of the CEDS Study Area are characterized as having high unemployment. Pockets of high unemployment are concentrated in Imperial Beach, parts of Chula Vista, National City, El Cajon, and parts of the City of San Diego including City Heights, Encanto, and Southeast San Diego.

According to the American Community Survey between 2005 to 2009 the CEDS Study Area unemployment rate was 7.5 percent, in San Diego County it was 6.7 percent. The national unemployment rate between 2005 to 2009 was 7.2 percent and the unemployment rate at the state level was 7.9 percent.

On the other hand, two jurisdictions within the San Diego portion of the CEDS Study Area are of particular concern. National City and El Cajon also follow the State's trend, but have consistently higher unemployment rates than the county, the CEDS Study Area and the State. Current

unemployment rates for these two cities are 10.8 percent (National City) and 9.2 percent (El Cajon) respectively according to American Community Survey data (see Appendix # 12).

According to the San Diego Workforce Index, for the San Diego Region, the unemployment rate decreased to 9.8 percent in May 2011 – the first time in over two years where the unemployment rate fell below 10 percent. The drop reflects the growth of jobs, the increase in temporary employment and the decline of the first-time unemployment claims. The creation of 250 new jobs in one month in the San Diego County region is attributed with the decline in unemployment.⁶

The unemployment statistics for the CEDS Study area only was retrieved from the American Community Survey, from 2005 to 2009, can be found in Appendix # 12. It should be noted that there are dramatic indicators in certain census tracts with unemployment as high as 44% in subsections of some of the cities like National City.

Educational Attainment

The CEDS Study Area labor force is not as well educated as the average adult in California, particularly in terms of higher education. About 22.9 percent of the population age 25 and over in the CEDS Study Area has completed high school as their highest form of education, compared to 21.9 percent statewide, and 29.3 percent in the United States. Additionally, only 16.4 percent have completed a four-year degree in the CEDS Study Area compared to an estimate of 19.1 percent statewide, and 17.4 percent at the federal level (See Table 13). 5.7 percent of the CEDS population has a Masters degree compared with 7.1 percent at the state level, and 7 percent at the federal level. 33.4 percent of the CEDS population has an associate's degree or greater compared to 37.4 percent at the state level, and 35 percent at the federal level. This will limit the types of industries that the region can currently support.

Table 12 – Educational Attainment of the CEDS Study Area Population Age 25 and Over

2005-2009 American Community Survey 5-Year Estimates						
	CEDS Area Estimate	Distribution (%)	California Estimate	California Distribution (%)	United States Estimate	United States Distribution (%)
Population Age 25 and Over	892,587		23,219,217		197,440,772	
Less than a 9th Grade Education	84,332	9.4%	2,419,573	10.4%	12,550,193	6.4%
Some High School, No Diploma	90,141	10.1%	2,117,991	9.1%	17,894,984	9.1%
High School	204,609	22.9%	5,078,536	21.9%	57,861,698	29.3%

⁶ San Diego Workforce Index

Graduate Only						
Some College, No Degree	215,564	24.2%	4,925,426	21.2%	40,105,283	20.3%
Associate's Degree	72,847	8.2%	1,771,425	7.6%	14,663,437	7.4%
Bachelor's Degree	146,565	16.4%	4,428,328	19.1%	34,384,717	17.4%
Master's Degree	51,233	5.7%	1,639,525	7.1%	13,900,234	7.0%
Professional School Degree	17,344	1.9%	520,300	2.2%	3,850,948	2.0%
Doctorate Degree	9,952	1.1%	318,113	1.4%	2,229,278	1.1%
High School Graduates + Some College, No Degree	420,173	47.1%	10,003,962	43.1%	97,966,981	49.6%
Associate or College Degree or More	297,941	33.4%	8,677,691	37.4%	69,028,614	35.0%

Commuting Patterns

The CEDS Study Area is dominated by commuters most of whom (74.4 percent) drive alone to work. Only 4.4 percent use public transportation and about 5.4 percent work at home. This profile of CEDS Study Area commuters is comparable to the typical California and U.S. commuters (see Table 13).

Average commute times are less than the statewide average and more inline with the U.S. average. The majority (65 percent) of CEDS Study Area workers drive less than 30 minutes. Statewide approximately 60 percent of workers travel less than 30 minutes to work. Average commuting time in the CEDS Study Area is 26 minutes compared to the state at 30 minutes and national at 28 minutes.

Table 13 – Commuting Patterns of the CEDS Study Area Workers

2005-2009 American Community Survey 5-Year Estimates

	CEDS Area Estimate		CEDS Area Distribution (%)	California		California Distribution (%)	United States		United States Distribution (%)
	Estimate	Total		Estimate	Total		Estimate	Total	
Drove alone	473,642	636,243	74.4%	11,813,411	16172158	73.0%	105,185,519	138541405	75.9%
Carpooled	70,891	636,243	11.1%	1,948,299	16172158	12.0%	14,577,524	138541405	10.5%
Public transportation (excluding taxicab)	28,084	636,243	4.4%	829,971	16172158	5.1%	6,859,705	138541405	5.0%
Motorcycle	2,548	636,243	0.4%	54,714	16172158	0.3%	301,418	138541405	0.2%
Bicycle	3,462	636,243	0.5%	144,853	16172158	0.9%	687,199	138541405	0.5%
Walked	18,319	636,243	2.9%	445,313	16172158	2.8%	3,964,813	138541405	2.9%
Other means	4,486	636,243	0.7%	156,683	16172158	1.0%	1,219,225	138541405	0.9%
Worked at home	34,558	636,243	5.4%	770,852	16172158	4.8%	5,575,316	138541405	4.0%

Source: U.S. Census Bureau, 2005-2009 American Community Survey, B08301. MEANS OF TRANSPORTATION TO WORK - Universe: WORKERS 16 YEARS AND OVER; Data Compiled by SANDAG.

	CEDS Area		CEDS Area Distribution (%)	California		California Distribution (%)	United States		United States Distribution (%)
	Estimate	Total		Estimate	Total		Estimate	Total	
Less than 10 minutes	60,000	601,685	10.0%	1,789,510	15401306	11.6%	19,076,501	132966089	14.3%
10 to 19 minutes	178,930	601,685	29.7%	4,483,417	15401306	29.1%	39,773,594	132966089	29.9%
20 to 29 minutes	152,261	601,685	25.3%	3,112,126	15401306	20.2%	27,434,072	132966089	20.6%
30 to 44 minutes	136,427	601,685	22.7%	3,255,667	15401306	21.1%	26,094,852	132966089	19.6%
45 to 59 minutes	37,526	601,685	6.2%	1,213,612	15401306	7.9%	9,960,593	132966089	7.5%
60 to 89 minutes	24,518	601,685	4.1%	1,072,363	15401306	7.0%	7,377,471	132966089	5.5%
90 or more minutes	12,023	601,685	2.0%	474,611	15401306	3.1%	3,249,006	132966089	2.4%
*Average Travel Time (minutes)	26					30			28

Source: U.S. Census Bureau, 2005-2009 American Community Survey, B08303. TRAVEL TIME TO WORK - Universe: WORKERS 16 YEARS AND OVER WHO DID NOT WORK AT HOME, Data Compiled by SANDAG.

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are

subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables.

While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities.

Workforce Development

Through the Workforce Development Service providers and partnerships established in the CEDS Study Area, job seekers can receive skills training for a wide range of occupations that support existing and emerging businesses.

Some of the training programs include:

- Accounting
- Automotive
- Biomedical
- Building Maintenance
- Certified Nurse Assistant
- Computer Literacy
- Construction
- Electrician Apprenticeship
- Integrated Circuit Layout Design
- Manufacturing Processes
- Medical Assistant
- Medical Services
- Renewable Energy
- Retail Sales / Customer Service
- Truck Driving
- Welding & Metal Fabrication

The San Diego Workforce Partnership, Inc. (SDWP) has established cost-effective programs and services promoting self-sufficiency and addressing the current and long-term needs of the region's employers and job seekers. The network of One-Stop Career Centers and the service providers offer adult and youth employment and training programs, labor market information, employment resources, summer and after-school jobs for youth, and job training for dislocated workers.

The San Diego and Imperial Counties Labor Council is another avenue for workforce development in the CEDS Study Area. The Labor Council is the local central body affiliate of the AFL-CIO. It includes 125 affiliated labor groups within San Diego County. Nearly every sector of the workplace is represented in the membership, including the building and construction trades, hotel workers, longshoremen, nurses, fire fighters, teachers and more. The Labor Council provides training in a variety of skills and trades from entry level to journeyman.

Recognizing that rapid technological advances and a fiercely competitive global economy make finding skilled and qualified workers a challenge; the Labor Council has worked alongside the SDWP, community colleges, and local employers to provide a range of job training programs and help meet employers' need for skilled workers.

The Labor Council's programs include Vocational English as a Second Language (VESL), pre-employment training in employer and workplace expectations, work ethics, resume preparation and job interviewing skills. A state-of-the-art computer technology center helps job seekers improve their English, math, and general computer skills, thereby improving their chances for better jobs. Technical skills are also taught in several trades so clients can be placed with some of the area's largest union employers.

According to the U.S. Secretary of Labor, community colleges are the #1 workforce developer. Community colleges provide the largest amount of workforce training in the nation and in California. This is also true for the CEDS Study Area's where three community college districts and four community colleges are located. These community college districts provide educational, career, and technical preparation for approximately 59,437 students each year. More than 500 programs in these colleges range from one-day certifications for food handlers to multi-year programs for specialized automotive, engineering and medical fields.

Current Industry Mix and Employment

The CEDS Study Area's industry concentration can be broadly described as, manufacturing industries in South San Diego County, and defense-related industries in East San Diego County. According to the American Community Survey between 2005 and 2009 in the CEDS Area, the civilian labor force was 672,927 with civilian employment at 622,148 and unemployment at 50,779 (see Appendix 12).

It is important to note that sub-county data on industry employment is not available so the figures cited in this section include all of San Diego County. As a result, some of the economic specialties in the CEDS Study Area may be diluted by the types of industries represented in parts of San Diego County that are outside the study area.

In San Diego County, in 2010 there were 1,229,800 jobs; this is a 2 percent increase over the 2,000 job number. Of these jobs, 18 percent are government jobs. The largest industry is professional business and financial services at 22 percent (see Figure 4).⁷

Military installations are prevalent in the CEDS Study Area and include military bases and ports, Coast Guard stations, recruiting and training facilities, and hospitals. Other industry sectors supporting the region's economy include computer sciences, electronics manufacturing, financial and business services, software development, and telecommunications.

⁷ Note that industry employment is based on employment by place of work rather than by place of residence. Data presented includes all of San Diego County.

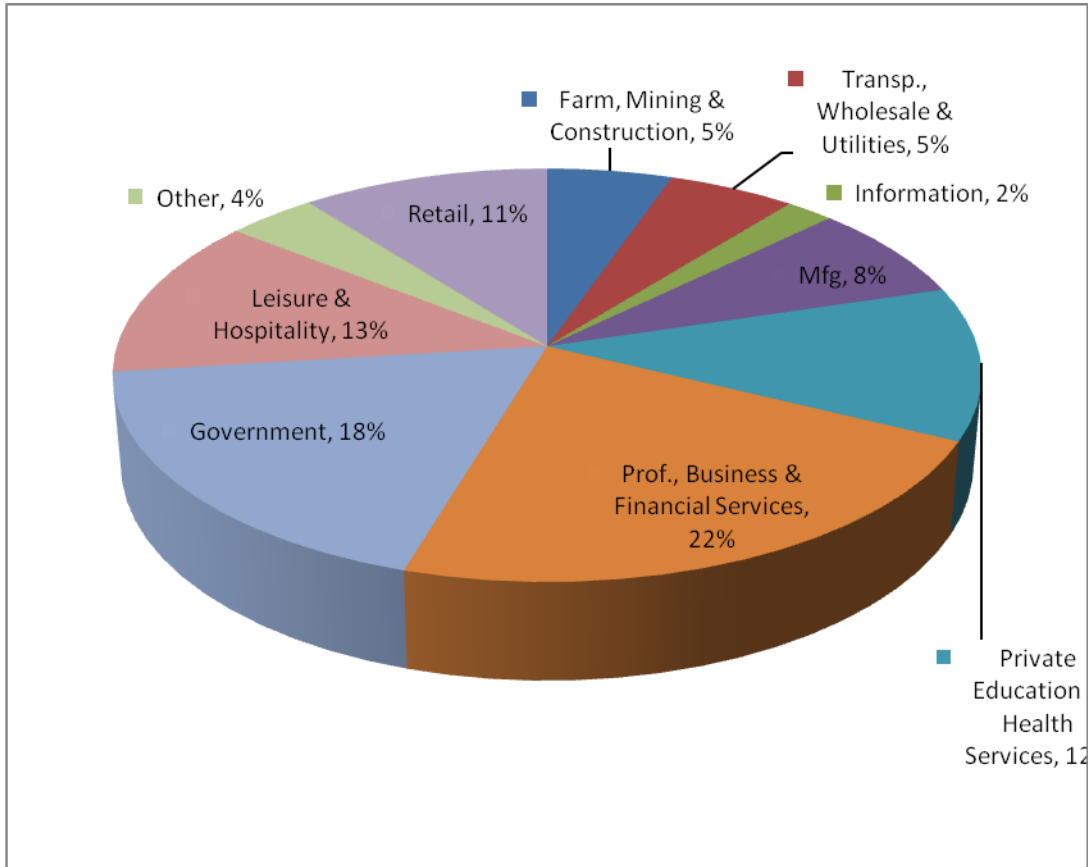
Table 14 – Employment by Industry, San Diego County

TITLE	2000	2010	% Chg.
Total, All Industries	1,205,700	1,229,800	2%
Total Farm	11,400	9,700	-15%
Total Nonfarm	1,194,300	1,220,200	2%
Mining	300	400	33%
Construction	69,700	55,500	-20%
Manufacturing	122,600	92,400	-25%
Durable Goods	92,200	70,600	-23%
Nondurable Goods	30,400	21,800	-28%
Wholesale Trade	39,100	39,200	0%
Retail Trade	133,800	130,000	-3%
Transportation, Warehousing & Utilities	29,800	27,500	-8%
Information	35,800	25,200	-30%
Financial Activities	71,200	67,100	-6%
Professional & Business Services	198,800	208,000	5%
Educational Services (Private)	18,200	26,600	46%
Health Care & Social Assistance	97,200	120,600	24%
Leisure & Hospitality	129,000	154,600	20%
Other Services	42,200	47,200	12%
Government	206,600	226,000	9%
Federal Government	42,100	46,900	11%
State & Local Government	164,600	179,100	9%
State Government	35,000	42,600	22%
Local Government	129,600	136,500	5%

Source: California Employment Development Department; compiled by SANDAG

Note: Some data may not add due to rounding. Government jobs do not include service members.

Figure 5 - Employment by Industry for San Diego County



Source: California Employment Development Department; compiled by SANDAG
 Note: Some data may not add due to rounding.

Employment for the retail sector may be disproportionately high when looking at the demographics of the local market. But because of the proximity to buyers from highly-populated cities across the border, market demand for goods and services is stronger. Health care may also be disproportionately high because so many have no health care coverage, or may be uninsured, or underinsured, and as a result, more of the population’s care falls to clinics and hospitals. Also, it is believed that a significant number of Mexico’s population come to the U.S. for health care.⁸

The largest increases in terms of absolute employment growth have been in educational services, leisure and hospitality, and government. Non-durable goods and the manufacturing and construction sector have lost the greatest amount of jobs (see Table 15).

The nature of industry growth is indicative of underlying structural issues that may undermine long term sustainability. Much of the growth is being driven by local population-serving industries rather than by basic industries that bring in wealth from outside the local area. Basic industries such as manufacturing have declined in employment in recent years.

⁸ Source: SCEDC Healthcare Profile.

There have been unanticipated impacts to the construction industry. As the foreclosure rate raises the ability to purchase existing housing at a price substantially less than a year ago has caused potential home buyers to purchase existing homes instead of new homes. Coupled with the tightening of financial institutions' lending abilities, high unemployment and low consumer confidence has resulted in a substantially reduced need for new homes. This has resulted in significant job loss in the construction industry. There is an opportunity to reposition workers and businesses through retraining and increased skill set to meet current and future needs. This is of particular interest as it applies to retraining for new "green" jobs that are anticipated.

D. Factors Affecting Economic Performance

To set the stage for discussion on economic performance and opportunities, at the June 2010 CEDS work session the former CEDS Committee determined the strengths, weaknesses, opportunities, and threats of the study area (see Table 16). The current CEDS Committee reviewed the table and determined the strengths, weaknesses, opportunities, and threats of the study area remain the same. The table below summarizes this work (listed in no particular order) and is the basis for the remainder of this section and the economic development initiatives set out in the Action Plan that follows.

Table 15 - CEDS Study Area Strengths, Weaknesses, Opportunities, and Threats (SWOT)

Strengths	Weaknesses
<ul style="list-style-type: none"> • Access to higher education • Border-related commerce / NAFTA / Pacific Rim(FTZ), Maquiladora Industry/Cross Border Manufacturing • California (weather, quality of life, location) • Economic and business diversity and opportunities, Department of Defense and tourism opportunities • Incentives(Enterprise Zones) • Land availability • Natural resources • Regional partnerships / Good neighborhoods • Transportation (highways, ports, airports) • Workforce / Population (size, diversity) • Multi-lingual 	<ul style="list-style-type: none"> • Costs (housing, wages, taxes) • Unfriendly business regulatory environment and development process • Educational funding • Border wait times • Inconsistent and/or disconnected approach to regional planning, development • Infrastructure limitations, needs (water, public transportation, highways, border) • Workforce (skill level, language & cultural barriers) • Geographic size • Distance from Washington DC and Sacramento • Geographic limitations/Build out
Opportunities	Threats
<ul style="list-style-type: none"> • Collaboration/Shared resources/Mutual projects • Business networks such as Connectory • Inter-regional transportation (rail, airport) • Business growth / Jobs (increased international trade, defense contractors, micro-enterprise, small business development) • Communities (variety of sizes) • Land / Ocean uses • Recreation / Destination tourism • Border improvements • Natural "Economic" resources (sun and wind) • Multi-cultural • Bi-national Collaboration 	<ul style="list-style-type: none"> • Natural (wildfires, mudslides) • Water shortages/High Cost • Foreign competition • State / Local conflicting policies • Border safety and security issues • Aging workforce • Parochialism • Lack of (opposition to) infrastructure development • Lack of funds/Schools • Special interests

A more comprehensive asset mapping exercise, while beyond the scope of this CEDS, would provide a deeper understanding of the resources, networks, culture, and attitudes of the CEDS Study Area's economy and would indicate what critical assets may be missing.

For the purpose of this CEDS document, potential assets were evaluated based on their ability to contribute to the CEDS Study Area's *sustainable competitive advantage*.

Economic Development Assets are those unique items of value (tangible and intangible) that communities have and can use to achieve economic and workforce development goals. Assets can provide a sustainable competitive advantage over other communities and therefore provide the foundation for a strategic economic development action plan. Assets have value, are rare, are hard to imitate, and can be used to advance economic development opportunities.

Table 16 - CEDS Study Area's Sustainable Competitive Economic Development Assets

Physical	Social	Economic	Organizational
International Border Infrastructure Large Tracts of Developable Land	Multi-lingual Workforce Multi- cultural Workforce Quality of Life Leisure / Recreation	Existing Industries Emerging Industries Educational / R & D Complex Military / Department of Defense Tourism	Leadership Collaborative

The remainder of this section identifies the most significant economic development issues and factors that impact the economic performance of the CEDS Study Area. In order for the CEDS Study Area to reach its economic potential and realize the vision as identified by the CEDS Committee, these areas must be addressed and mitigated to the greatest extent possible.

Border Infrastructure

The CEDS Committee recognizes that the need for improved infrastructure at the border is critical to the economic development of the region and that more regional collaboration is needed between the CEDS Study Area, Mexico and U.S. government related to cross border issues. Mexico and the CEDS Study Area are tightly bound culturally and economically. Besides the commercial and employee crossings, the tariff-free assembly industry (maquiladoras) is Tijuana's largest employer and entails warehousing and trucking on the U.S side.

Economic integration implies a porous border, but security and immigration policy demand a barrier and therein lies the challenge — how to fully realize the economic potential of the region (both Mexico and California) through seamless trade and efficient movement of goods and

services. A safe and efficient environment is critical to economic investment and international commerce.

The U.S.-Mexico border crossings in the CEDS Study Area are busy (see Table 18). Truck traffic alone in 2008 averaged over 98,000 trucks a month at all CEDS Study Area ports of entry combined. The monthly average for personal vehicles and buses in 2008 was over 2.3 million. The total number of people crossing (via vehicle and pedestrian) averaged over 5.7 million a month in 2008. This level of activity causes extensive wait times at the ports of entry and long border wait times are a competitive disadvantage for the CEDS Study Area’s economic development opportunities.

Table 17 – Northbound Border Crossing at CEDS Study Area Ports of Entry

	Commercial Vehicles	Passenger Vehicles	People (via bus, car, pedestrian)
2009	1,026,642	26,536,413	41,305,707
2010	1,088,707	25,259,609	40,753,686

Source: US Department of Transportation, Research and Innovative Technology Administration, Bureau of Transportation Statistics

Commercial traffic wait times are considerably longer at the California-Mexico borders than at the Texas-Mexico border or any of the U.S.-Canada border crossings (Table 19).

Border delays at these crossings are responsible for significant economic losses on both sides of the border as documented in studies completed by the San Diego Association of Governments (SANDAG). The economic impact of congested freight movements is felt not just locally but also at the national level due to time delays that increase cost, and reduce revenue and productivity. A company’s supply chain is very time-sensitive and products coming north tend to be more time-sensitive than southbound products because they are mainly made up of intermediary products for home and business, such as CD players, televisions, printers, copiers, etc.

Table 18 – Comparison Northbound of Border Wait Times, 2008

	California-Mexico	Texas-Mexico	US-Canada
Passenger Wait Times	22 to 58 minutes	8 to 44 minutes	3 to 31 minutes
Commercial Wait Times	3 to 43 minutes ⁹	2 to 39 minutes	1 to 18 minutes

Source: US Department of Homeland Security, US Customs and Border Protection, August 2008

Mexico has begun southbound inspection of vehicles. This adds to the wait times and the economic impact. As highways and interstates connecting to border stations become congested,

more cars and trucks will begin using surface streets further impacting communities. Communities in the CEDS Study Area receive a significant portion of sales tax revenues from shoppers who travel across the border. Longer wait times would seriously impact the competitive position of the CEDS Study Area's manufacturing, logistics, commercial, retail, recreational, and tourism industries. Adequate infrastructure is needed to accommodate southbound checks.

South County EDC is in the process of conducting a pedestrian border crossing wait time survey. In July 2010, SCEDC released the first quarter worth of data. SCEDC is currently working with Customs and Border Protection agency on suggestions to reduce the pedestrian border crossing wait times.

Partial list of Border Infrastructure and Other Projects under Consideration

- A cross-border terminal that would connect Otay Mesa with Tijuana's International Airport and enable travelers to access the airport from the U.S. side of the border thereby easing travel congestion has received Presidential Permit from the U.S. Federal Government. This project is expected to begin construction later this year.
- Otay Mesa East (also known as Otay 2) is a proposed new border crossing located a just east of the existing Otay Mesa Port of Entry. A Presidential Permit, which is required for any new border crossing between U.S. and Mexico and Canada, was issued by the U.S. Department of State on December 2008. When completed this will be the seventh California-Mexico border crossing. It is expected to be the most technologically advanced crossing in the CEDS Study Area and offer considerably shorter wait times. State highway improvements are needed to accommodate passenger vehicles and commercial truck traffic. This project is currently seeking funds.
- Construction has started on the expansion of the San Ysidro Port of Entry to help alleviate congestion. San Ysidro is the most heavily traveled international border crossing in the world.
- Tecate Port of Entry underwent an expansion of its commercial processing facilities in 2009.
- Additional Secure Electronic Network for Traveler's Rapid Inspection (SENTRI) pedestrian and vehicle lanes opened April at the Otay Mesa Port of Entry and will allow members to expedite border crossings by using radio frequency identification technology (RFID). In the first quarter of 2011, a new SENTRI office was opened in San Ysidro, CA. SENTRI is the U.S. Customs and Border Protection's expedited program for pre-approved, low-risk travelers. San Ysidro's SENTRI program, which opened in September 2000, currently has over 100,000 members.
- The City of San Diego has entered into an exclusive negotiation agreement with DPC Brown Field to redevelop Brown Field Airport, another Port of Entry in the border community of Otay Mesa. This public-private partnership is anticipated to promote local and international commerce while creating more than 4,000 permanent jobs.

The border infrastructure needs, wait times, and safety issues are challenges that must be addressed to support and encourage the business development projects currently planned and underway on both sides of the border and to ensure the potential jobs that should be generated from these projects are realized.

Infrastructure

Not unlike most areas of California, deterioration of local roads, water, and wastewater treatment and distribution systems due to aging, and other infrastructure have suffered from a lack of funding. Local agencies and districts are placed in the unenviable position of accommodating growth with fewer resources (tax dollars, user and development fees, and grant funds). This impacts the CEDS Study Area's ability to be competitive and attract and retain industries that would provide jobs for the CEDS Study Area workforce. When infrastructure is inadequate to serve the company's needs, experience has shown that many times companies are forced to take the CEDS Study Area off the list of potential locations and look elsewhere to build or expand their operations.

Funding is needed for construction of new roadways, expansion and maintenance of existing roadways, and other infrastructure projects to accommodate current and projected growth demands. Specific infrastructure improvement projects identified for the CEDS Study Area are contained in the following documents.

- Cali Baja Bi-National Mega-Region Global Competitiveness Strategy (2009)
- California-Baja California Border Master Plan (Caltrans, 2008)
- Port of San Diego Compass Strategic Plan (2007)
- San Diego's Maritime Trade, A Critical Economic Engine (San Diego Institute for Policy Research, 2008)
- Regional Economic Impact Study of California High Speed Train (San Diego Institute for Policy Research, 2008)
- General Plans of the counties and cities of San Diego
- Building a Foundation to Achieve Global Competitiveness, San Diego Regional Economic Prosperity Strategy (SANDAG, 2008)

Gillespie Field will be enhanced to accommodate additional General Aviation services as recommended in the San Diego Regional Airport Strategic Plan (RASP). Drawing on East County's EDC's Gillespie Field Development committee, which has met continuously since 1993, is already exploring economic development strategies to address the infrastructure, business,

and workforce training initiatives required to take advantage of increased Gillespie Field operations.¹⁰

Improvements to the Bradley Avenue/SR-67 interchange are needed to accommodate increased aviation and industrial demand that increased airport operations require and ensure ongoing planning for quality development at the adjacent Gillespie Field airport and surrounding commercial and industrial area.

Further enhancements of Highways 52 and 67 with circulation planning in and around Gillespie Field to support business development opportunities are needed.

SR-125 toll road in South County recently emerged from bankruptcy. The tolls charge for use of this road may impact the economic opportunities of the surrounded areas.

SR-11 is a state highway that has been planned for but has not received funding. This roadway will connect a new Port of Entry, known as Otay 2, with Highway 905. This is considered a major trade corridor and is needed to ensure the distribution of goods that travel between the U.S. and Mexico.

Sunrise Power Link is currently under construction and will provide another route for delivery of energy to San Diego County; this high voltage transmission line will begin in Imperial Valley and travel through East County and South County. It is expected to transport solar generated power to the CEDS area.

South Bay Power Plant, a water cooled generation plant located on the Chula Vista Bayfront, is slated to be demolished. In 2011, the Port of San Diego began the process of obtaining necessary approvals to begin demolition.

In North San Diego County, a desalinization plant received approval and will augment the region's water supply. This is a new desalinization plant located in Carlsbad.

The City of San Diego is in the process of conducting a pilot recycled water project to augment the water supply in the reservoir. This will increase the water availability for the San Diego County region.

Otay Water District is investigating the use of water transfers from Mexico to the U.S. to augment the water supply for the CEDS Study Area.

The Metropolitan Transit Authority has been improving the trolley tracks in the CEDS Study Area that go from the U.S.-Mexico Border to Downtown San Diego. These improvements are expected to improve the efficiency of service in the CEDS Study Area.

¹⁰ Information derived from The San Diego Regional Strategic Plan and SANDAG Regional Transportation Plan.

Environment

Along with the infrastructure needs at the ports of entry to meet the ever increasing traffic congestion and the transportation system expansions and upgrades that are needed, other equally challenging matters for the CEDS Study Area are those regarding the shared environment. Water, air, energy, plant and animal life, beaches, a healthy environment overall is all threatened with rapid population growth and industrialization south of the border. These are environmental issues that transcend borders and impacts both U.S. and Mexico communities.

San Diego County was designated as a “non-attainment area” for the Federal 8-Hour Ozone Standard in 2004, and despite improvement remains nonattainment based on 2008-2010 ozone air quality data. Additionally, San Diego County is anticipated to be nonattainment for a pending new, more stringent Federal 8-Hour Ozone Standard expected from the EPA by late summer 2011. Added restrictions caused by being named a “non-attainment area” and other environmental issues mentioned elsewhere further impact the CEDS Study Area’s attractiveness and competitive position for business expansions and attractions. Bi-national planning and solutions to these issues is critical to generating the competitive advantage that the border proximity gives to the CEDS Study Area.

U.S. and Global Economies and Local Economic Stability

The current recession (some argue depression) has been and continues to be felt deeply in the CEDS Study Area. According to recent reports San Diego’s regional economy is still contracting, with housing starts hitting a 41-year low last year, employers continuing to shed jobs, and consumer spending stuck in the doldrums.¹¹

Employment in the manufacturing sector has declined in the past few years, potentially undermining the long-term stability of the region.

In 2010, the Center on Policy Initiatives and the United Way calculated that a single person needed to earn at least \$27,733 per year (or \$13.13 per hour) to maintain a basic needs budget in the area. One adult with a pre-schooler would need to earn \$45,985 per year (or \$21.77 per hour) to maintain the same basic needs budget. By the time you reach a family of two adults, an infant and pre-schooler would need to earn at least \$64,957 to maintain the same basic needs budget.¹² This is far above the federal poverty line of \$11,161 for an adult \$14,787 for an adult with a pre-schooler, and \$21,756 for two adults, an infant, and a pre-schooler. The federal poverty level as stated by the U.S. Census Bureau 2009.

30 percent of working-age San Diego County households don’t earn enough to live self sufficiently. 229,195 working-age San Diego County households live below self sufficiency. Over half of those are working full-time. 88.7 percent of non-retired households living below the self

¹¹ UCLA Anderson Forecast., <http://www.bls.gov/web/laummtrk.htm>

¹² *A Path to Prosperity Revisited; Education, Opportunity and the Cost of Living*, San Diego Workforce Partnership, 2008.

sufficiency standard have at least one worker and over half of those workers are employed full-time.¹³

In order for the CEDS Study Area to fully realize its economic potential, it will be imperative that it retain and expand the primary industry base and at the same time create more jobs — better-paying jobs for the entire spectrum of workforce skills and talents including jobs that offer broader career pathways, the chance for upward mobility, and career advancement.

Military

The CEDS Study Area's economy currently and historically has been heavily influenced by the presence of the U.S. military and Department of Defense. The use of private contractors by this sector of the economy has been a major revenue and job generator.

For example, the Space and Naval Warfare Systems Command (SPAWAR) is the largest Defense Department acquisition command west of the Mississippi. It includes the SPAWAR System Center Pacific (SSC-Pacific), a federal research and development laboratory. Many of SPAWAR's contractors have a presence in the CEDS Study Area because of ready access to SPAWAR and its labs. The local military facilities in San Diego are presently composed of 246 military, 4,213 U.S. Government civilians, and 1,931 on-site contractors. Additionally, SPAWAR can accommodate in excess of 1,200 personnel.¹⁴

The San Diego CEDS region is home to an extensive, wide-ranging, and complex array of U.S. military and defense installations that generates billions of dollars for the local economy, produces thousands of jobs, and acts as an engine of innovation for the region's businesses. According to the 2011 *San Diego Military Economic Impact Study* commissioned by the San Diego Military Advisory Council (SDMAC), in fiscal year 2009, the Department of Defense spent \$18.2 million in San Diego County, and this direct spending fed \$30.5 billion into the local economy and sustained about 355,000 jobs.

The CEDS region is the headquarters of the Space and Naval Warfare Systems Command (SPAWAR), the Navy acquisition command responsible for the development and systems integration of Navy and joint Command, Control, Communications, Intelligence, Reconnaissance and Surveillance (C4ISR) technology and platforms.

SPAWAR Systems Center – Pacific, located in Pt. Loma and in continual operation since 1947 -- is the Navy's premier research, development, test, and evaluation (RDT&E) laboratory for C4ISR. SSC Pacific provides complete life cycle development and support for military C4ISR systems — from concept to fielded capability. Its laboratory settings, test beds and simulated operational environments offer working environments unachievable elsewhere. In San Diego, close proximity to many of America's top defense contractors, global leaders in digital communications and computing, world-class educational institutions and major Navy and Department of Defense

¹³ Center for Policy Initiatives, "Making Ends Meet in San Diego County 2010"

¹⁴ Source: SPAWAR Office of Public Affairs, (www.spawar.navy.mil)

commands allows SSC-Pacific to actively partner with industry, academia and other government and non-government entities.

SPAWAR and SSC-Pacific provide high tech, high wage jobs for scientists and engineers but also require thousands of installers, technicians, and support staff to implement their missions. Given the new national emphasis on manufacturing, the CEDS region is poised to foster the retention of defense manufacturing jobs to make C4ISR systems, autonomous platforms, and cyber-security devices and software.

Between fiscal years 2007 and 2009, DoD spending in San Diego County increased by 28 percent, according to the report. That spending included \$16.3 billion in wages in fiscal year 2009, an increase of 26 percent from fiscal year 2007. The \$30.5 billion overall economic output from DoD spending in fiscal year 2009 also was up 28 percent from \$23.8 billion in fiscal year 2007.

Despite projected cuts to future Defense budgets, the San Diego region stands to be a net gainer owing to its increasing military utility and shift of military focus to the West Coast. The SDMAC report cites 21 ships that either will be newly deployed or will redeploy to San Diego by 2012. In addition, the Marine Corps *Grow the Force Expansion* initiative will bring more than 4,000 new Marines to the San Diego region.

Both the Navy and Marine Corps also are slated to spend large amounts on local construction projects in the coming years according to the SDMAC study. Projected Defense-wide military construction cuts are unlikely to have local impact. The CEDS region hosts the Naval Facilities Engineering Command Southwest Region (NAVFAC Southwest), one of ten facilities engineering commands (FECs) in NAVFAC. This command is comprised of over 3,400 Federal employees (civil service, officers, and enlisted).

DoD spending increases between 2007 and 2009 resulted mainly through a \$3.4 billion increase in procurement spending, which means buying goods and services. The DoD spent \$10.6 billion in procurement in fiscal year 2009, and its top purchases included \$1.8 billion for ship building and repairing, \$1.7 billion for engineering services, almost \$1.2 billion for research and development and \$1.2 billion for construction.

On top of procurement payouts, the DoD spent almost \$4.9 billion on active duty salaries, \$982 million on civilian salaries and more than \$1.6 billion on retirement and disability payments. Salaries paid to employees by the major regional defense contractors and smaller local businesses generated about \$7.4 billion in personal earnings, the report said.

Much of the commercial high tech growth in the CEDS Study Area and the greater San Diego region has been due to spin-offs spurred by Department of Defense investment in technology that took place at SPAWAR and its lab.

While south and east San Diego County is associated with much of the R&D and more advanced or technical manufacturing in the region, as global competition increases, many manufacturing firms are forced to look overseas for additional or more affordable manufacturing. Some production will continue to move overseas. Being able to stay within the U.S. may enable more manufacturing firms in the CEDS Study Area to take advantage of the military and/or defense department markets and provide more-skilled and better paying jobs.

To protect this valuable asset it is critical that the jurisdictions and service providers in the CEDS Study Area strive to ensure the workforce, infrastructure, business resources, and general business climate stays competitive and is conducive to building this sector of the economy.

Education

While some areas within the CEDS Study Area report higher educational attainment, as a whole, the resident labor force of the CEDS Study Area is not as well educated as the average adult in California, particularly in terms of higher education. About 76 percent of the population has completed high school, compared to 80 percent statewide and only 21 percent have completed a four-year degree or more compared to 30 percent statewide.

It is important to note that some of these statistics may be distorted to some degree because data from regions within the CEDS Study Area that are closest to the U.S.-Mexico border may include U.S. citizens, born in the U.S. who reside in Mexico and have been educated in Mexico.

Educational attainment is traditionally regarded as a key to economic prosperity and it has been well established that there is a strong relationship between higher educational attainment, higher income, and higher economic productivity. Fortunately, some inroads are being made to raise the educational level of the CEDS Study Area workforce.

San Diego is participating in the California Partnership for Achieving Student Success (Cal-PASS). Cal-PASS started as a sharing project of the Grossmont-Cuyamaca Community College District with the goal of increasing student transition and quickly expanded regionally to San Diego County. In January 2003, the project received a grant to implement the program statewide and it is now supported by the Governor and the Legislature with ongoing funding. An important component to Cal-PASS is the new national institute known as IEBC (Institute for Evidence-Based Change) is based in San Diego County, and is supporting and expanding on the work of Cal-PASS. Included in the work of IEBC is specific work that focuses on foster youth and other disadvantaged populations. Cal-PASS continues to be unique nationally for its connection of meaningful data to classroom teaching and has been recognized by the U.S. Secretary of Education, Arne Duncan.

Cal-PASS acts as a catalyst to improve instruction and better prepare students for the next educational level by sharing student data between P-12 schools, community colleges and universities, identifying barriers and problems and facilitating changes. Cal-PASS is the only system that not only collects data about student success and transition from every segment of education, but facilitates its use in monthly meetings by local teachers committed to making

positive changes in the classroom. With the information collected, participating partners are better armed to identify problems and develop local solutions. Current reporting by local districts show substantial improvements in CEDS area schools where this work is taking place.

The CEDS Study Area needs a concerted effort to continue and expand successful programs that are designed to boost educational attainment and skills training; thereby, improving the CEDS Study Area's competitive position, supporting the existing and new businesses, and removing limitations that lead to low-education and low-skill industry growth.

Housing and Jobs-Housing Balance

Owner occupied homes are often an indication of stable neighborhoods and a stable workforce. Homeowners are people who are investing in their communities, building wealth and financial security. When business owners/managers evaluate new locations, homeownership is a factor considered because it is an indicator of how easy it will be for them to not just attract but to keep the workers they need.

A disproportionate number of renter-occupied units are an indication of housing affordability. Renter occupied housing in the CEDS Study Area is only slightly lower than owner occupied housing (see Table 9), but another indicator of affordability is that only 50.4 percent of the housing inventory is made up of single family detached units.

Because the housing costs are lower in the southern areas of the CEDS Study Area, the commute is by and large northbound, i.e. from Mexico to U.S. The increased traffic, congestion, and border wait times caused by the bi-national commute could be countered with a two-fold concerted, collaborative and sustained effort to (1) attract, expand and grow industries where people live, and (2) provide affordable housing options near the jobs. One of the ways to accomplish this is to encourage transit-oriented development. SANDAG has encouraged these types of projects with competitive grants to local jurisdictions. However, there is a vast amount of projects still needed and funding remains an obstacle to encouraging and accomplishing this type of development.

Opportunities with Existing and Emerging Industries

Although a full target industry analysis was not undertaken for the CEDS Study Area, an analytical approach was used to identify the region's existing industry concentrations and emerging industries in what may be a good fit to the CEDS Study Area.¹⁵

Table 20 presents a preliminary list of those industry groups that should benefit from the region's assets and would be most apt to expand and/or locate in the region. The CEDS staff and board will continue to refine, conduct research, and gather industry intelligence to document the region's ability to meet the needs of these industries.

¹⁵ Appendix 2: Methodology and industry specific data.

A more thorough industry analysis is needed to refine the list of industries to those that are complementary of the CEDS Study Area's assets and to a manageable number so that business attraction, retention, and expansion efforts can be concentrated and resources allocated effectively.

Table 19 - Potential Target Industries for CEDS Study Area

Industry Group	Typical SD/Imp Wage Range (000's)						Employment Growth Projection			Local Historical Growth		
	\$20	\$30	\$40	\$50	\$60	\$70+	Up	Down	Flat	Up	Down	Flat
Ag & Fruit/Veg Processing			✓				✓					✓
Biomedical Products				✓	✓	✓	✓*				✓*	
Biotech & Pharmaceutical					✓	✓	✓					✓
Business Services		✓	✓	✓			✓			✓		
Communications				✓			✓*			✓		
Computer & Electronics					✓	✓		✓			✓	
Defense					✓	✓		✓		✓		
Design / Creative			✓	✓			✓			✓		
Entertainment/Recreation	✓	✓	✓				✓			✓		
Environmental Tech						✓			✓	✓		
Financial Services					✓	✓	✓			✓		
Renewable Energy			✓	✓	✓	✓	✓			✓		
Specialized Health Care			✓	✓			✓			✓		
Specialty Foods			✓					✓*		✓		
Travel & Hospitality	✓						✓			✓		

* These industries have experienced only a very slight growth or decline.

The Mega-Region Initiative is a long-term economic development strategy partnering San Diego County, Imperial County and Baja California, Mexico. While the focus of this CEDS is limited to specific parts of San Diego County, the over-arching goal of the Mega-Region Initiative is to build collaborative relationships especially around marketing among the three distinct regions that constitute the Mega-Region to attract high value investments. The border is as both an opportunity for some and a challenge for others including the fact that the border infrastructure is used for commerce to pass through the CEDS area without economic benefit. The Mega-Region Initiative is committed to working to ensure the border region within the targeted CEDS area is

able to benefit from the collaborative marketing efforts around targeted inbound investments and to work to ensure key industries retain and grow suppliers.

The remainder of this section provides a synopsis of why these particular industry groups may be compatible with and successful in the CEDS Study Area. In the Appendix is an industry intelligence briefing that includes current industry challenges and needs.¹⁶

- **Biomedical Products, Biotechnology, and Pharmaceuticals** — Medical device manufacturing has a sizeable presence in the San Diego region and has experienced employment growth from 2001 to 2007 and national estimates indicate continued employment growth is anticipated. This industry pays very good wages. The CEDS Study Area offers access to like companies, suppliers, research, universities, and potential venture capital funding sources (because of large biotech companies in the region). Easy and accessible off-shore manufacturing in Mexico is an advantage to some start-up and/or expanding companies that may use third-party contract manufacturers for their initial manufacturing.
- **Business / Financial Services** — This industry had strong historic growth and projected growth estimates continue to be strong. Access to high speed telecommunication technology is important to this industry group especially since many telemarketing companies hire workers who work from home. This allows them to hire a more skilled workforce, pull from a wider labor market, and reduces the need to make large capital investment in call center facilities. This business strategy supports the CEDS Study Area's desire to support and expand home-based business options for the rural areas.
- **Communications** — This industry has had strong historic growth and projected growth estimates continue to be strong. Firms within this industry sector generally pay good wages. CEDS Study Area has access to defense and military markets. Mexico is a major import/export partner for certain sub-sectors of this industry group.
- **Computer and Electronics** — Firms involved in the repair and maintenance of precision devices, like electronic medical and navigational instruments provide good-paying, steady work that is less subject to economic downturns. Demand exists for specialists in equipment that is old or rare, has hard-to-find parts, or requires a broad range of skills and experience. Focusing on a very specific sub-sector of this industry group, for example companies providing services to defense-related manufacturers, would provide high paying jobs for the CEDS Study Area.
- **Defense** — This is an important industry group for the CEDS Study Area that will continue to be in demand and can provide a range of occupational opportunities for the workforce and jobs that pay better-than-average wages. The CEDS Study Area has an important competitive asset that serves this industry sector. The Connector is a statewide, web-

¹⁶ Appendix 3: Industry intelligence summary and detailed reports.

based buyer-supplier network where government, business, and institutional buyers can identify sources of products, services, technologies, capabilities, and capacities at every level of the supply chain.

- **Design / Creative Industries** — The shift to digital graphic design transformed the industry and added new competition as well as new opportunities, including e-commerce, social networking, video production, etc. With technology, graphic design firms can serve clients internationally. Companies with international audiences require workers who have knowledge of the culture and are multi-lingual – assets of the CEDS Study Area’s workforce. A well defined arts and cultural downtown and/or district with a concentration of unique retail shops, museums and other creative and cultural offerings draws both local people and tourists, thereby supporting and extending the recreation and hospitality industries.
- **Entertainment / Recreation / Travel and Hospitality** — While wages for jobs in these industries are often at the lower end of the scale, companies within these industries do offer a wide range of occupations for all skill levels. Eco- and/or historic tourism are a particularly good fit for the more rural areas and South County coastal areas where the infrastructure and population base is not sufficient to support large or many companies. Recreational amenities and destination events existing in the CEDS Study Area that can be expanded upon include: fairs and festivals with an existing following, air shows, camping, bird watching, fishing, hiking, casinos, etc.
- **Entrepreneurship and Home-based Businesses** — A focus on home-based businesses and entrepreneurship is good strategy for the more rural communities in the CEDS Study Area. While further data is needed to fully analyze this industry, the development and expansion of this industry group is expected to be supported with technical and business counseling assistance, communication/internet access, a growing retail and tourism customer base.
- **Environmental Technology** — The environmental consulting industry has undergone rapid expansion in part because of increased public awareness and concern about environmental issues (climate change, air and water quality, etc). These concerns are especially important to the CEDS Study Area because the shared border brings with it borderless environmental issues. Another important aspect of this industry that is important to the CEDS Study Area is that environmental consulting companies are building expertise in renewable and alternative energy sources to serve the growing market. The industry group also includes manufacturers of equipment and products serving government, defense-related, and logistics companies which are prevalent in CEDS Study Area.
- **Specialized Health Services** — Growth in this industry sector for the CEDS Study Area is concentrated in mental health specialists, clinics, and care centers. An increased emphasis on cost-cutting by insurance carriers has led to treating substance abuse and mental health patients outside of the hospitals. Community-based support groups have become an integral part of the treatment. Demand for special programs for youth (i.e. behavior

modification schools and camps) is expected to grow because of the benefits of early treatment. The rural areas of the CEDS Study Area could be attractive to these types of schools and treatment centers. As the population ages, health care and particularly specialized services for the elderly will be critical to the area.

- **Emerging Challenges and Opportunities**

Support and development of agriculture: Recent efforts by the White House and USDA have been focused on the production and availability of quality fresh foods. For instance, a recent USDA study identifies communities and neighborhoods, several located in our CEDS area, that are considered to be “food deserts.” At the same time, agriculture in rural San Diego County has declined steadily as development pressures increase and water becomes more expensive.

Total crop value countywide decreased by 24 percent from 2000 to 2009. The average production in the years 2008 and 2009 decreased 28 percent. Market share by ornamental and nursery has increased, but not enough to counteract the much larger decrease in orchard crops, vegetables and grains.

Despite these decreases, San Diego County’s total agriculture production in San Diego County for 2009 was well over \$2.5 billion. The county has more individual farms – 6,687 -- than any other county in the U.S. and tops both California and the nation in avocados and floriculture products. It has the largest community of organic growers – 374 farms -- of any county in the nation and is among the top five California counties for production of cucumbers, mushrooms, tomatoes, boysenberries, strawberries, grapefruit, Valencia oranges, tangelos and tangerines.

Agriculture in San Diego County is an important economic asset that increases food security, long-term employment, food availability and business ownership in the region.¹⁷

Goal: Preserve and enhance agriculture.

Initiatives:

1. Support efforts to introduce, promote and produce new crops that are both suitable for arid and semi-arid lands and desirable to consumers.
2. Promote value-added operations that enhance profitability, such as bee-keeping and agricultural tourism.

¹⁷ San Diego County Department of Agriculture Weights and Measures. (2010) “2009 Crop Statistics and Annual Report” www.sdcawm.org

U.S. Department of Agriculture. “AFBF Rural Development Workshops Available to State and County Farm Bureaus for 2010” <http://ruralcommunitybuilding.fb.org/trainings/>

U.S. Department of Agriculture Rural Development. “Business and Cooperative Assistance” http://www.rurdev.usda.gov/BCP_redlg.html

Science Daily: “More Economical Process for Making Ethanol from Nonfood Sources” <http://www.sciencedaily.com/releases/2010/03/100325121952.htm>

3. Support the creation of policies and ordinances that help local growers and producers become, or remain, more profitable.
4. Encourage the revitalization of high school and community college courses, farm bureau and USDA programs offering agriculture education and/or training.
5. Encourage and assist exploration of fuel cropping.

Opportunities for New Development

The South County has a large portion of undeveloped land in the CEDS area unlike the East County and the downtown areas. The Chula Vista Bayfront is the largest undeveloped parcel along the ocean in California. A master plan for these areas has been developed and is currently going through the approval processes. Additional projects include the Millennia project, the equivalent to 8 square city blocks, with a technology park and a university planned next to it. Additionally, Pond 20 straddles both Imperial Beach and San Diego is an undeveloped piece of land that is over 60 acres. The Port of San Diego has embarked on an analysis of this property to determine how much and which portion of this land is suitable for development. Brown Field in Otay Mesa has interested developers currently working with the city of San Diego to create a plan. While the development strategy is still underway there is a strong consensus and willingness to have the surround area of Brown Field becomes a manufacturing hub with over 300 acres set aside for these types of uses.

Along the border there are plans for two new border crossings. The first, Otay 2, has received the necessary approvals and is awaiting funding. The second has only shown on a recent long range planning map and that is the crossing in Jacumba. Both of these ports of entry are vital to accommodate the growth that is expected in the communities on both the U.S. and Mexico sides.

Redevelopment has a critical role in the vitality of the region, particularly in the more urban settings and especially in East County and Downtown. Cities such as El Cajon, National City, Imperial Beach, Santee, Chula Vista, San Diego, La Mesa, Barrio Logan, Sherman Heights and Lemon Grove are anxiously awaiting a decision by the Governor to determine where they can invest their redevelopment dollars. The current proposal by the Governor requires the return of all redevelopment dollars. This will place many planned projects on hold in these older communities.

CHALLENGES

While the CEDS area is ripe with opportunities funding and infrastructure remains a critical obstacle to securing new jobs and companies. Securing and sustaining a reliable water and energy supply is necessary to maintain our businesses. Additionally, the costs associated with land development, labor force, housing, water and energy act as a deterrent for companies to locate in the CEDS area. Furthermore, lower operational costs and cost of living and a lesser amount of regulations with more certainty in the approval processes acts as an incentive for companies to locate in other states and other countries as opposed to our ability to retain them in the CEDS area. Many other states have set up offices or make visits to our major companies with the intent of luring them to their areas. Furthermore, a solar manufacturing company located

in the southern portion of the CEDS area recently relocated to Mexico citing significantly lower labor costs. In summary, the CEDS area has significant competition from other states and countries making retention of our companies, particularly our manufacturing industry, difficult to retain.

While being located along an international border is an advantage to some, it also poses risks not typically found in other parts of the nation. Wait times at the border impede our ability to have products shipped easily and discourage legal workers from coming to work across the border. Security is an issue with the perception that the security concerns of Mexico readily cross the border and impact the CEDS area. This is not the typical case. Furthermore, the CEDS area is a gateway for traffic that comes through the border and uses the infrastructure in the CEDS area only to transport goods through the CEDS area using our infrastructure to carry products throughout the U.S.

E. CEDS Goals, Initiatives, and Action Plan

This section presents the CEDS Study Area's vision, and goals. It also identifies key initiatives that will help implement the goals plus several action items for each initiative. The action plan is consistent with applicable state, county, and city economic strategic plans, and makes the most of the depth and breadth of organizational leadership and collaborations already existing in the region. The CEDS Action Plan is intended to:

- fully realize the economic development potential and unique opportunities the international border presents;
- focus on creating new jobs and other employment opportunities such as home-based businesses that pay family-sustaining wages through the recruitment of new business, business start ups and existing business expansions;
- support efforts to improve educational performance and increase workforce skills;
- promote sound management of physical development and infrastructure improvements; and
- encourage public and private sector investment that makes the greatest regional economic impact.

Based on input from the public input process, the CEDS committee established the following vision for the CEDS Study Area which makes the most of the assets and expertise available.

Goals

CEDS Study Area Vision

The CEDS Study Area's economic prosperity will be attributed to the clear vision, strong partnerships, and political will and cooperation maintained by the region's leadership on both sides of the international border that result in full realization of shared assets.

The CEDS Study Area will be a vibrant, prosperous area with a strong, diverse economic base and an innovative and creative environment where new ventures and entrepreneurs thrive.

Businesses, workers and residents will benefit from the area's efficient transportation options, affordable housing that is close to work, sustainable natural resources, good schools, colleges and universities, highly educated workforce, and unparalleled cultural and recreational opportunities.

The CEDS Study Area will be proud of its commitment to sustainable growth as evidenced by its green buildings, energy generation and conservation efforts and the reduction of the region's carbon footprint.

The CEDS steering committee established goals that articulate the region’s approach to achieving the stated vision and are the basis for the initiatives presented in this section. These goals establish the framework that supports future grant applications to EDA for funding of economic development projects and initiatives. To monitor the success of the CEDS and the region’s economy, performance criteria have been established and are presented at the end of this section.

The CEDS committee and this CEDS commit resources and interests to achieving the vision and accomplishing the following goals which are designed to maximize synergies and opportunities to expand economic growth.

- ***Collaboration and Leadership*** — Build on the CEDS Study Area’s economic development strengths, opportunities, and assets by contributing to a unified approach to economic prosperity and sustainability that includes private and public sector leadership, partnerships and the dedication of resources.
- ***Business Development and Entrepreneurship*** — Actively support, integrate, expand, and diversify the CEDS Study Area’s economic base including existing, emerging, and locally-owned businesses and entrepreneurs that generate quality jobs, investment and environmental sustainability.
- ***Education and Workforce Development*** — Support the development of a highly skilled and well-trained regional workforce that is prepared for a wide range of jobs in existing, emerging and projected industries.
- ***Infrastructure Development*** — Commit resources to the infrastructure needed to support international trade, economic growth, multinational transportation, including international airports such as “aerotropolis” and sustainability throughout the CEDS Study Area.
- ***Quality of Life*** — Work to ensure the CEDS Study Area is a place where people of all ages, incomes, and backgrounds want to live and can enjoy a safe environment and a high quality of life.

Initiatives and Action Plan

Goal 1 — Collaboration and Leadership — Build on the CEDS Study Area’s economic development strengths, opportunities, and assets by contributing to a unified and bi-national approach to economic prosperity and sustainability that includes private and public sector leadership, partnerships and the dedication of resources.

Initiative: Communicate CEDS vision and goals throughout the CEDS Study Area.

- Conduct ongoing communication among CEDS committee members and partners; provide regular updates on the status of grants, projects, initiatives and mutual areas of interest and concern.

- Regularly speak to state and federal representatives, present news and information about all parts of the CEDS Study Area, including regional efforts, and successes.
- Create and maintain a print and electronic press kit that contains relevant information and statistics on the CEDS goals, initiatives, and successes.
- Post press releases and news stories on CEDS and partners' websites.

Initiative: Build a regional leadership base that is well-informed, economic development savvy, ethnically, politically and geographically diverse and includes multiple generations.

- Sponsor and/or co-sponsor economic development education, training, and informative events to encourage the cross-pollination of ideas and information sharing from diverse perspectives.
- Provide economic development training for decision makers and key partners.

GOAL 2 — Business Development and Entrepreneurship — Actively support, integrate, expand, and diversify the CEDS Study Area’s economic base including existing, emerging, and locally based businesses and entrepreneurs that generate quality jobs, investment and environmental sustainability.

Initiative: Establish private and public partnerships to capture cross-border (U.S.-Mexico and San Diego County) economic development opportunities.

- Establish and maintain a database of key organizations and individuals in the US and Mexico involved in providing assistance to businesses and entrepreneurs.
- Contact lead organizations/agencies and influencers on both sides of the Border and discuss the CEDS and areas of mutual concern and opportunity, clearly articulating how the CEDS can help, with the benefits of collaboration, especially with potential resource funding for priority projects.
- Support mutually beneficial, cross-border projects which may relate to education and training, public safety, research, information dissemination, funding, regulatory issues and other business / economic development matters.

Initiative: Develop and implement a strategy to fully realize the potential of the existing and emerging industries; develop and recruit new industries.

- Continue the first-phase industry analysis conducted for this CEDS with a more thorough assessment of the CEDS Study Area because the economies are interrelated.
- Based on the findings from the comprehensive industry assessment, document the advantages of operating a business in the CEDS Study Area, the benefits the border location offers, the quality of the workforce, readiness of properties, etc. Use this documentation to build a business case for each target industry.¹⁸

¹⁸ Appendix 4: Elements of a Business Case.

- Also based on the findings from the comprehensive industry assessment, document the resource and physical needs of new and/or existing industries that may be lacking in the CEDS Study Area and work with partners to secure them, i.e. establishing or expanding financing programs, venture capital, technical assistance, communications/internet infrastructure, land, buildings, training programs, etc.
- Develop and implement a prioritized attraction, expansion, retention strategy for the identified targeted industries that includes regional and bi-national partnerships that will help to capture maximum business opportunities especially for cross-border trade.
- Monitor existing and target industries' growth and investment potential, import/export activity and potential, and their requirements (sites, building, occupations, skills, etc.).
- Support and assist with efforts to establish CEDS Study Area businesses on databases, such as the Connectory, promote their use and maximize the understanding of the industrial supply chain capabilities in the CEDS Study Area.¹⁹
- Support and/or assist with efforts to study the feasibility of establishing local preference procurement policies in support of CEDS Study Area businesses.

Initiative: Encourage the development and growth of renewable energies and resources.

- Support and assist funding efforts for renewable energy generation, distribution and use, and support policies with similar goals.
- Promote, educate and support the use of sustainable and or green building business practices, projects and policies.

Initiative: Encourage the growth of innovative and creative entrepreneurial and home-based businesses throughout the CEDS Study Area, particularly in the rural areas.

- Support and assist the efforts of the Civic, Arts, and Cultural District projects and other like projects that support and advance the creative industries, entrepreneurs, and the use and reuse of historic buildings such as the Naval Training Center/Liberty Station project.
- Support and encourage public/private partnerships and programs designed to develop and expand local home grown businesses.
- Support, encourage, and establish programs that will provide the necessary assistance and guidance to those interested in developing home occupations and tourism-related small businesses in the less populated areas.
- Support the efforts of venture and angel capital networks, small business lenders, technical assistance providers, and other organizations, such as California Southern Certified Development Corporation (CDC), to identify and fulfill the specific needs of entrepreneurs and home-based businesses in the CEDS Study Area.
- Co-sponsor events and venues that reach entrepreneurs, educates them regarding the lending programs available, and promotes networking among entrepreneurs and lenders.

¹⁹ The Connectory is a statewide, web-based buyer-supplier network where government, business, and institutional buyers can identify sources of products, services, technologies, capabilities, and capacities at every level of the supply chain.

- Explore the feasibility of pursuing funding to address specific entrepreneurial needs such as the establishment or expansion of venture or angel capital networks.

Initiative: Ensure that businesses have access to financing programs and credit assistance.

- Promote and support existing financing programs.
- Support partner organizations that are working to establish new, flexible and accessible financing, bonding and working capital programs, and that are assisting companies with credit issues, business and financial planning.
- Secure additional funding for business capital, as need is identified.

Initiative: Strive to improve the regional business climate and where possible the California business climate.

- Provide economic development training for elected officials and other decision makers.
- Support clearly articulated and streamlined planning and development processes and regulations.
- Promote and support incentive programs to serve existing businesses and attract new business.

GOAL 3 — Education and Workforce Development — Support the development of a highly skilled and well-trained regional workforce that is prepared for a wide range of jobs in existing and future businesses.

Initiative: Strengthen the connections between businesses and educators in an effort to prepare workers for jobs in the target industry groups.

- Sponsor and/or co-sponsor with industry education forums to (1) connect and inform about the importance of the P-16 system to the economic health of the region; (2) identify the key training programs that are needed by businesses; and (3) ensure businesses are aware of those training programs that are currently available.
- Engage local businesses to help educators and trainers align P-16 curriculum with the skills businesses need, thereby clearly preparing students for career paths.
- Support and encourage participation in programs such as California Partnership for Achieving Student Success (Cal-PASS) and other programs that link P-16 education and workforce development.²⁰

²⁰ Cal-PASS is an initiative that collects, analyzes and shares student data to track performance and improve success from elementary school through university. Over 6,800 K-16 schools in over 52 counties are participating.

Initiative: Provide opportunities for the CEDS Study Area youth to obtain work skills and business experiences.

- Explore the feasibility of offering programs designed to help underprivileged youth broaden and advance their education, leadership skills, and opportunities in business. Expand the entrepreneurial program initiative (Goal 2) to the younger population by providing students with opportunities for hands-on learning that will teach critical thinking, job and business skills, create real life learning experiences.²¹
- Encourage and support high schools and high school programs that create student-run businesses.
- Encourage and support expanded Regional Occupation Programs courses particularly for manufacturing and business service sectors.
- Support the creation and/or expansion of a four year university that would provide education and improved skills for the future workforce

Initiative: Improve the educational attainment and skill-based training in the CEDS Study Area.

- Support the capacity and efforts of workforce investment boards, community colleges, trade schools, and apprenticeship programs, etc. to upgrade education and skill levels of the CEDS Study Area workforce (make them more accessible and visible to community).
- Document and expand strategies that lead to improved student performance through various programs, including, but not limited to Cal-PASS.
- Support efforts to increase the capacity and capability of “English as a second language” classes.
- Support efforts to create a multi-lingual workforce.

GOAL 4 — Infrastructure Development — Commit resources to the infrastructure needed to support safe and secure international trade, economic growth, and sustainability throughout the CEDS Study Area.

Initiative: Work to ensure local, state, and federal political representatives recognize and understand the importance of maintaining, improving, and expanding the infrastructure of the US-Mexico border to support commerce and security.

- Create and/or update informative materials, data and statistics that convey the importance of improving and expanding the US-Mexico border crossing infrastructure, the extent of the commerce that comes through the US-Mexico borders, the importance of reducing border wait times, and the impact that safe and efficient border crossings have on all US businesses.
- Help to document the data and statistics used to support the informative materials.
- Collaborate with partners to efficiently and effectively disseminate the materials and inform state and federal political representatives.

²¹ Appendix 5: Sample youth entrepreneurship program information.

Initiative: Support regional efforts to enhance, improve, and expand infrastructure within the CEDS Study Area and the border ports of entry.

- Assist in identifying and securing funding for infrastructure improvements, including but not limited to: water supply and distribution; wastewater disposal and reuse; energy generation, distribution and conservation; communications/internet technology; and air quality.
- Support cross-border efforts to address concerns of binational infrastructure and technology, natural resources and environmental problems, i.e. air and water quality, energy, etc.
- Support efforts to address and mitigate the impact of Mexico's policy of southbound checks and increase efforts to raise awareness of the impacts of this policy on US businesses.
- Support efforts to expand the SENTRI program in the US, and in Mexico, so that each port of entry in the CEDS Study Area has a sufficient number of dedicated SENTRI lanes to facilitate efficient and secure border crossings.
- Support and encourage the use of technology at ports of entry and the creation of new ports of entry to reduce border wait times, thereby facilitating efficient cross border trade.
- Cultivate political will to support, fund, and implement needed improvements throughout CEDS area.

Initiative: Explore, expand and improve the passenger and cargo transportation infrastructure in the CEDS Study Area to ensure there are secure and efficient trade corridors that support business development and facilitate the efficient movement of goods and people across borders.

- Support and/or secure funding to initiate necessary studies on transportation infrastructure improvement needs including highways and roadways; public and mass transit rail and light rail; airports; waterways; seaports; and border ports of entry.
- Support and/or secure private and public funding for infrastructure development.
- Support and advance efforts of CEDS Study Area partners to identify and execute solutions to the extended border wait times.
- Cultivate political will to support, fund, and implement needed improvements.

Initiative: Support and promote existing and planned infrastructure projects.

- Support and assist in the advancement of port of entry infrastructure upgrades and expansions, related transportation projects, the California-Baja California Border Master Plan projects, and other master planned projects.
- Support and assist with efforts to identify potential funding sources and applications for grant funding to implement projects.
- Support efforts for the construction of new and/or expansion of existing ports of entry that may be identified by SANDAG, local jurisdictions, and/or other organizations, including determining the demand and political support for new or expanded ports, projected uses (i.e. commercial or pedestrian), and their feasibility.

- Identify and capitalize on the economic development opportunities that may arise out of new or improved infrastructure.
- Support future updates of the Border Master Plan.
- Ensure sufficient investment continues to be made in expanding, maintaining, and upgrading broadband and/or wireless technology infrastructure.

Initiative: Re-existing infrastructure projects – Gillespie Field seems to have dropped out.

- Support and assist in the advancement of regional infrastructure upgrades that facilitate the role of Gillespie Field in the CEDS area economic development, including infrastructure improvements to surrounding transportation corridors and aerotropolis considerations.
- Improvements to the Bradley Avenue/SR-67 interchange to accommodate increased aviation and industrial demand required by increased airport operations and implementation of quality development plans at the adjacent Gillespie Field airport and surrounding commercial and industrial area.
- Further enhancements of Highways 52 and 67 with circulation planning in and around Gillespie Field to support business development opportunities are needed.

GOAL 5 — Quality of Life — Work to ensure the CEDS Study Area is a place where people of all ages, incomes, and backgrounds want to live, work, study and play in an environment that supports a high quality of life.

Initiative: Expand arts, cultural, recreation, and entertainment activities that are readily accessible to people from both US and Mexico and would be attractive to international visitors.

- Assist and support new and existing strategies and projects designed to create and further recreational and tourism opportunities in rural areas, particularly eco-tourism, ag-tourism, heritage or historic tourism and off road vehicle recreation.
- Support and/or assist in identifying and securing funding to move priority projects forward.
- Add more public art and cultural institutions to attract visitors and tourists and encourage business relocation downtown.

Initiative: Support and encourage unique retail and downtown renovation and development.

- Build on cultural tourism efforts by supporting the development of “cultural shopping districts” into the CEDS Study Area shopping districts.
- Support local jurisdictions’ efforts to leverage state and federal funding to identify, assess, and renovate blighted areas.
- Encourage investment in redevelopment areas and downtowns by implementing programs designed to rid redevelopment areas of deterrents to investment, i.e. crime and public safety issues, graffiti, homelessness, gang activity, etc.
- Support and assist efforts that support and advance the creative industries, entrepreneurs, and the use and reuse of historic buildings.

Initiative: Work towards a jobs/housing balance.

- Encourage development of affordable housing near job centers and support efforts to create jobs where people live.
- Encourage local jurisdictions' efforts to increase knowledge of existing housing tax credits.
- Support local agencies' efforts to leverage funding from public and private sources to improve public safety and crime prevention and community security through innovative application of technology resources and proven community interventions.

Initiative: Recognize the diversity (age, ethnicity, background, etc) of the CEDS Study Area's population as an asset and strive to meet their needs.

- Assist with identifying areas for training and mentoring opportunities that can sustain Continuous Care and Residential Communities (CCRC).
- Support efforts to deploy medical technology and develop telemedicine (wireless healthcare) opportunities that will facilitate the growth of the rural healthcare industry to support the population in rural areas.
- Support and assist efforts to build capacity for educational institutions that serve the CEDS Study Area population including, but not limited to training in health care related fields. Under consideration are community colleges to offer B.S.N.'s as a means to increase the nursing supply in the region.
- Assist with developing programs and services to enhance the quality of life that are in demand by both US and Mexico's older, retired, and snowbird populations and for those displaced and under employed.
- Support efforts to identify and implement programs that focus on training and retraining of the region's diverse population to ensure current and emerging technologies have a workforce that is proficient in using current and emerging technologies. Prepare a diverse population to enter the workforce thereby helping to insure that industry has a supply of well-trained workers.

F. Evaluating Performance

The successful implementation of the CEDS Study Area CEDS goals and initiatives will be measured by (1) establishing a baseline and (2) regularly monitoring improvements in the economic factors presented in the following matrix. Upon adoption of the CEDS the monitoring effort will be done through the CEDS Steering Committee. The Steering Committee determine the highest and best entity to directly monitor each effort described below and report back to the CEDS Committee with a comprehensive overview of the measurements. Monitoring will be done in conjunction with local and state economic development efforts. The CEDS Steering Committee will have performance measures based on job creation and retention. To measure these factors we will use SANDAG estimates. Due to the significant economic decline throughout the nation it will also be incumbent upon the CEDS Steering Committee to report investment based on large projects. This is expected to show actions that may have mitigated a more significant job loss number. For example, a major company expanding in the CEDS Study Area would be shown on the report as potential for job creation and regional investment and possibly job retention, in spite of overall job numbers declining in the CEDS Study Area. By monitoring, and actively working to encourage investment that leads to job retention and creation we anticipate conveying major projects will more appropriately reflect what is occurring.

Furthermore, the CEDS will be reviewed annually and altered as necessary to address the current needs and opportunities, list specific projects and ensure the plan is compatible with the State's overall economic strategies. The following items, which relate to the goals and specific measurements was established by the CEDS steering committee.

Table 20 - Measuring Performance and Celebrating Success of the CEDS Study Area

Goal	Tasks / Activities / Initiatives	Factors to be Measured	Monitoring Frequency
1	Communicate CEDS vision, goals, initiatives	Presentations Press coverage Meetings with legislators E.D. training events	Annually
2	Business development strategy	In-depth target industry analysis completed and final target industries determined Business case established Business attraction, expansion, retention implementation plan completed and initiated Additional businesses on the Connector Funding for cultural / eco-tourism and other rural development strategies New business locations, expansions Jobs created	Semi-Annually

Goal	Tasks / Activities / Initiatives	Factors to be Measured	Monitoring Frequency
2	Renewable energies	Funding for developing renewable energies Investment in Infrastructure Projects Established green building policies New renewable companies established	Annually
2	Entrepreneurship and Creative Industries	Entrepreneurship programs established and number of participants Venture capital and angel capital networks established Events supporting / educating entrepreneurs	Annually
2	Financing and Credit Assistance	Use and expansion of existing financing programs New financing programs established Loans made	Semi-Annually
2	Improved regional business climate	Use of existing and establishment of new incentive programs New companies locating, existing companies expanding, new start-ups Jobs and Median Wages of Primary Jobs	Annually
3	Connect business and educators	Industry and education forums Curriculum changes Cal-PASS participation Participation in Workforce Training Programs	Annually
3	Youth work skills	Youth entrepreneurship program successfully established and participants	Annually
3	Educational attainment	Graduation rates Student Performance on State Testing Matriculation rate	Annually
4	Border infrastructure	Funding for and investment in border expansions and improvements Border Wait Times Analysis and Reduction in Wait Times.	Annually
4	Other Infrastructure	Investment in transportation and other infrastructure projects Implementation of broadband projects	Annually
5	Quality of Life	Median Housing Value Median Household Income Funding for downtown renovation and developments	Semi-Annually

G. Common Themes in Recent Studies

The goals, objectives, and projects outlined in recently completed studies and plans that were reviewed during the development of this CEDS, target a variety of themes of the economic development climate of the region. The vision, goals, and objectives presented in the Action Plan (Section E) reflect these common themes.²²

Infrastructure

- Efficient, safe, and timely movement of people, property, and cargo across borders.
- Established process for communication among local, state, and federal organizations that will improve understanding of Ports of Entry and other border-related infrastructure needs.
- Strong transportation network.
- Continued investment in broadband and other technical infrastructure and resources.
- Adequate, reliable, and affordable supply of water and energy for business and residents.

Connections

- Continue and expand collaboration and partnerships with communities and organizations throughout the region and across the border.
- Improve networking opportunities between education and business to facilitate information sharing and strategy development.
- Entrepreneurship and Venture Capital.

Workforce / Employment

- A labor force that is adaptable and prepared for today's and tomorrow's jobs (basic skills, technical skills, and soft skills such as communications, teamwork, supervision, etc).
- Increased training opportunities for all workers.

Business Development and Business Climate

- A business climate that supports innovation and entrepreneurship.
- Balanced and diversified economic base that provides a range of employment opportunities that pay sustainable wages and offer advancement (career ladder jobs).
- Sufficient inventory of prepared sites and buildings to accommodate new/expanding industries.
- Streamlined business permitting and other business-friendly policies and practices.
- Sustainable development that balances economic development with preservation of resources.
- Industry attraction, expansion, and retention including: agri-services, high-tech, renewable energy, biotech, bio-agriculture, medical devices, specialized manufacturing, and/or logistics.

²² Appendix 6: Summary of the findings, goals, and strategies of recently completed studies and plans.

Quality of Life

- Sufficient range of housing types and prices to support a balanced demography.
- Pedestrian, transit-oriented and bike-friendly neighborhoods.
- Tourism and recreational opportunities.
- Support and expand creative aspect of communities including historic, cultural, and artistic endeavors.
- Strong school districts and safe neighborhoods.

Appendix (separate document)

- 1) Results of public survey
- 2) Industry analysis methodology and data tables
- 3) Industry intelligence on emerging and existing industries
- 4) Elements of an effective business case
- 5) Sample of an effective youth entrepreneurship program
- 6) Summary of recent plans and studies complete
- 7) Table 4 - Population Growth & Characteristics of the CEDS Study
 - a. LANGUAGE SPOKEN AT HOME BY ABILITY TO SPEAK ENGLISH FOR THE POPULATION 5 YEARS AND OVER - Universe: POPULATION 5 YEARS AND OVER, Data Compiled by SANDAG. Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization. Explanation of Symbols:
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 2. An '-' entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution.
 3. An '-' following a median estimate means the median falls in the lowest interval of an open-ended distribution.

4. An '+' following a median estimate means the median falls in the upper interval of an open-ended distribution.
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6. An '*****' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.

8) Table 6 Family Household Income and Poverty Status of the CEDS Study Area

a. *Family Household By Income*: FAMILY INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: FAMILIES, B19113. MEDIAN FAMILY INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: FAMILIES Source: CA and US: U.S. Census Bureau, 2005-2009 American Community Survey, B19101. FAMILY INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: FAMILIES, B19113. MEDIAN FAMILY INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: FAMILIES; SANDAG estimates based on American Community Survey data Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization. Explanation of Symbols:

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6. An '*****' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.

b. *Family Household by Poverty Status: POVERTY STATUS IN THE PAST 12 MONTHS OF FAMILIES BY FAMILY TYPE BY PRESENCE OF RELATED CHILDREN UNDER 18 YEARS BY AGE OF RELATED CHILDREN - Universe: FAMILIES, Data Compiled by SANDAG.* Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization. Explanation of Symbols:

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9) Table 7 Household Incomes of the CEDS Study Area.

- a. HOUSEHOLD INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: HOUSEHOLDS, B19013. MEDIAN HOUSEHOLD INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: HOUSEHOLDS, B19301. PER CAPITA INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: TOTAL POPULATION. Source CA and US: U.S. Census Bureau, 2005-2009 American Community Survey, B19001. HOUSEHOLD INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: HOUSEHOLDS, B19013. MEDIAN HOUSEHOLD INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: HOUSEHOLDS, B19301. PER CAPITA INCOME IN THE PAST 12 MONTHS (IN 2009 INFLATION-ADJUSTED DOLLARS) - Universe: TOTAL POPULATION, Data Compiled By SANDAG. Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization. Explanation of Symbols:

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10) Table 8 Housing Characteristics of the CEDS Study Area

- a. *Housing Units by Tenure*: Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. NOTE. Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities and towns and estimates of housing units for states and counties. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the

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- b. *Tenure by Units in Structure for Occupied Housing Units:* Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. NOTE. Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities and towns and estimates of housing units for states and counties. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a

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- c. *Housing Values by Owner Occupied Housing Units:* Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. NOTE. Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities and towns and estimates of housing units for states and counties. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the

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 5. An '***' entry in the margin of error column indicates that the median falls in the lowest interval or upper interval of an open-ended distribution. A statistical test is not appropriate.
 6. An '*****' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.
- d. *Housing Units by Year Structure Built:* Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. NOTE. Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities and towns and estimates of housing units for states and counties. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the

ACS do not necessarily reflect the results of ongoing urbanization. Explanation of Symbols:

1. An '***' entry in the margin of error column indicates that either no sample observations or too few sample observations were available to compute a standard error and thus the margin of error. A statistical test is not appropriate.
2. An '-' entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution.
3. An '-' following a median estimate means the median falls in the lowest interval of an open-ended distribution.
4. A '+' following a median estimate means the median falls in the upper interval of an open-ended distribution.
5. An '***' entry in the margin of error column indicates that the median falls in the lowest interval or upper interval of an open-ended distribution. A statistical test is not appropriate.
6. An '*****' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.

11) Table 13 Commuting Patterns of the CEDS Study Area Workers

- a. NOTE. Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities and towns and estimates of housing units for states and counties. Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. Workers include members of the Armed Forces and civilians who were at work last week. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000

data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization. Explanation of Symbols:

1. An '***' entry in the margin of error column indicates that either no sample observations or too few sample observations were available to compute a standard error and thus the margin of error. A statistical test is not appropriate.
 2. An '-' entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution.
 3. An '-' following a median estimate means the median falls in the lowest interval of an open-ended distribution.
 4. A '+' following a median estimate means the median falls in the upper interval of an open-ended distribution.
 5. An '****' entry in the margin of error column indicates that the median falls in the lowest interval or upper interval of an open-ended distribution. A statistical test is not appropriate.
 6. An '*****' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.
- b. *Travel Time:* * Average Travel Time (minutes) to work was computed by using SANDAG calculators which took each midpoint for each range for time traveled, multiplied it by the total number of travelers for each range, and then took the sum of each range. NOTE. Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities and towns and estimates of housing units for states and counties. Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables. Workers include members of the Armed Forces and civilians who were at work last week. While the 2005-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the

principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization. Explanation of Symbols:

1. An '**' entry in the margin of error column indicates that either no sample observations or too few sample observations were available to compute a standard error and thus the margin of error. A statistical test is not appropriate.
2. An '-' entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution.
3. An '-' following a median estimate means the median falls in the lowest interval of an open-ended distribution.
4. A '+' following a median estimate means the median falls in the upper interval of an open-ended distribution.
5. An '***' entry in the margin of error column indicates that the median falls in the lowest interval or upper interval of an open-ended distribution. A statistical test is not appropriate.
6. An '*****' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.

12) San Diego South-East Region by Census Tract (CEDs Study Area Only)

San Diego South-East Region by Census Tract (CEDs Study Area only)

Per Capita Income and Unemployment Rate by Census Tract

(American Community Survey, 2005-2009)

U.S. Per Capita Income = \$27,041

U.S. Unemployment Rate = 7.2%

Census Tract	Geographic Name (Jurisdiction or Community Planning)	Per Capita Income (PCI)			Civilian Labor Force and Unemployment Rate				
		PCI	80% of the US PCI	Meets EDA Criteria	Labor Force	Employment	Unemployment	Unemp. Rate	1 % higher than US Unemp. Rate

Area)										
1.00	Uptown	\$79,046	\$21,633	FALSE	1,402	1,345	57	4.1%	8.2%	FALSE
2.00	Uptown	\$49,141	\$21,633	FALSE	3,755	3,629	126	3.4%	8.2%	FALSE
3.00	Uptown	\$41,973	\$21,633	FALSE	3,275	3,086	189	5.8%	8.2%	FALSE
4.00	Uptown	\$42,765	\$21,633	FALSE	2,507	2,327	180	7.2%	8.2%	FALSE
5.00	Uptown	\$48,034	\$21,633	FALSE	1,967	1,849	118	6.0%	8.2%	FALSE
6.00	Uptown	\$46,749	\$21,633	FALSE	1,978	1,898	80	4.0%	8.2%	FALSE
7.00	Uptown	\$41,575	\$21,633	FALSE	2,450	2,369	81	3.3%	8.2%	FALSE
8.00	Greater North Park	\$37,758	\$21,633	FALSE	2,816	2,534	282	10.0%	8.2%	TRUE
9.00	Greater North Park	\$28,599	\$21,633	FALSE	3,184	3,011	173	5.4%	8.2%	FALSE
10.00	Greater North Park	\$29,015	\$21,633	FALSE	3,355	3,194	161	4.8%	8.2%	FALSE
11.00	Greater North Park	\$29,556	\$21,633	FALSE	2,071	1,889	182	8.8%	8.2%	TRUE
12.00	Greater North Park	\$26,526	\$21,633	FALSE	3,040	2,707	333	11.0%	8.2%	TRUE
13.00	Greater North Park	\$25,818	\$21,633	FALSE	4,003	3,611	392	9.8%	8.2%	TRUE
14.00	Greater North Park	\$39,191	\$21,633	FALSE	1,821	1,780	41	2.3%	8.2%	FALSE
15.00	Greater North Park	\$30,005	\$21,633	FALSE	2,413	2,316	97	4.0%	8.2%	FALSE
16.00	Greater North Park & City Heights Normal	\$22,945	\$21,633	FALSE	3,037	2,779	258	8.5%	8.2%	TRUE
17.00	Greater North Park & City Heights Normal	\$25,510	\$21,633	FALSE	2,836	2,649	187	6.6%	8.2%	FALSE
18.00	Greater North Park & City Heights Normal	\$20,870	\$21,633	TRUE	3,683	3,454	229	6.2%	8.2%	FALSE
19.00	Greater North Park & City Heights	\$42,414	\$21,633	FALSE	2,002	1,963	39	1.9%	8.2%	FALSE
20.01	Kensington-Talmadge	\$59,747	\$21,633	FALSE	2,008	1,952	56	2.8%	8.2%	FALSE
20.02	Kensington-Talmadge & College Area	\$53,898	\$21,633	FALSE	1,364	1,346	18	1.3%	8.2%	FALSE
21.00	Kensington-Talmadge & Normal Heights	\$26,331	\$21,633	FALSE	3,036	2,901	135	4.4%	8.2%	FALSE
22.01	City Heights	\$11,746	\$21,633	TRUE	1,698	1,505	193	11.4%	8.2%	TRUE
22.02	City Heights	\$14,265	\$21,633	TRUE	2,098	1,942	156	7.4%	8.2%	FALSE
23.01	Kensington-Talmadge	\$14,515	\$21,633	TRUE	1,423	1,331	92	6.5%	8.2%	FALSE
23.02	City Heights	\$11,926	\$21,633	TRUE	2,421	2,166	255	10.5%	8.2%	TRUE
24.01	City Heights	\$14,620	\$21,633	TRUE	2,170	2,073	97	4.5%	8.2%	FALSE
24.02	City Heights	\$11,418	\$21,633	TRUE	2,017	1,850	167	8.3%	8.2%	TRUE
25.01	City Heights	\$14,239	\$21,633	TRUE	2,657	2,328	329	12.4%	8.2%	TRUE
25.02	City Heights	\$19,606	\$21,633	TRUE	2,871	2,650	221	7.7%	8.2%	FALSE
26.01	City Heights	\$12,123	\$21,633	TRUE	2,369	2,234	135	5.7%	8.2%	FALSE
26.02	City Heights	\$12,159	\$21,633	TRUE	1,852	1,676	176	9.5%	8.2%	TRUE
27.02	Eastern Area	\$18,286	\$21,633	TRUE	2,537	2,371	166	6.5%	8.2%	FALSE

27.03	Eastern Area	\$17,711	\$21,633	TRUE	3,191	2,853	338	10.6%	8.2%	TRUE
27.05	Eastern Area	\$19,976	\$21,633	TRUE	1,972	1,898	74	3.8%	8.2%	FALSE
27.06	Eastern Area	\$18,972	\$21,633	TRUE	3,351	3,201	150	4.5%	8.2%	FALSE
27.07	City Heights	\$10,109	\$21,633	TRUE	1,380	1,190	190	13.8%	8.2%	TRUE
27.08	City Heights	\$10,358	\$21,633	TRUE	2,351	2,037	314	13.4%	8.2%	TRUE
27.09	City Heights	\$15,614	\$21,633	TRUE	1,616	1,539	77	4.8%	8.2%	FALSE
27.10	City Heights	\$10,783	\$21,633	TRUE	1,529	1,349	180	11.8%	8.2%	TRUE
28.01	College Area	\$17,265	\$21,633	TRUE	1,351	1,209	142	10.5%	8.2%	TRUE
28.03	College Area & Kensington- Talmadge	\$28,658	\$21,633	FALSE	2,702	2,620	82	3.0%	8.2%	FALSE
28.04	College Area	\$29,410	\$21,633	FALSE	2,437	2,230	207	8.5%	8.2%	TRUE
29.02	Eastern Area	\$27,551	\$21,633	FALSE	2,893	2,635	258	8.9%	8.2%	TRUE
29.03	Eastern Area	\$24,315	\$21,633	FALSE	1,908	1,801	107	5.6%	8.2%	FALSE
29.04	College Area	\$12,471	\$21,633	TRUE	3,336	2,682	654	19.6%	8.2%	TRUE
29.05	College Area & Eastern Area	\$25,614	\$21,633	FALSE	2,380	2,157	223	9.4%	8.2%	TRUE
30.01	Encanto	\$16,982	\$21,633	TRUE	1,269	1,167	102	8.0%	8.2%	FALSE
30.03	Encanto & Lemon Grove	\$22,606	\$21,633	FALSE	2,358	2,242	116	4.9%	8.2%	FALSE
30.04	Encanto	\$11,905	\$21,633	TRUE	2,149	1,945	204	9.5%	8.2%	TRUE
31.01	Encanto	\$22,287	\$21,633	FALSE	1,626	1,521	105	6.5%	8.2%	FALSE
31.03	Skyline- Paradise Hills	\$19,182	\$21,633	TRUE	2,431	2,256	175	7.2%	8.2%	FALSE
31.05	Skyline- Paradise Hills	\$14,954	\$21,633	TRUE	1,608	1,494	114	7.1%	8.2%	FALSE
31.07	Skyline- Paradise Hills & Spring Valley	\$19,980	\$21,633	TRUE	2,784	2,653	131	4.7%	8.2%	FALSE
31.08	Spring Valley Skyline-	\$19,037	\$21,633	TRUE	1,524	1,380	144	9.4%	8.2%	TRUE
31.09	Paradise Hills	\$25,163	\$21,633	FALSE	1,713	1,614	99	5.8%	8.2%	FALSE
31.11	Encanto	\$12,454	\$21,633	TRUE	2,588	2,343	245	9.5%	8.2%	TRUE
31.12	Encanto	\$18,997	\$21,633	TRUE	2,120	1,864	256	12.1%	8.2%	TRUE
31.13	Encanto	\$22,681	\$21,633	FALSE	2,324	2,287	37	1.6%	8.2%	FALSE
31.14	Skyline- Paradise Hills	\$20,202	\$21,633	TRUE	1,775	1,669	106	6.0%	8.2%	FALSE
31.15	Skyline- Paradise Hills	\$17,990	\$21,633	TRUE	2,724	2,604	120	4.4%	8.2%	FALSE
32.01	Skyline- Paradise Hills	\$16,408	\$21,633	TRUE	1,464	1,322	142	9.7%	8.2%	TRUE
32.02	Skyline- Paradise Hills	\$17,846	\$21,633	TRUE	2,156	1,968	188	8.7%	8.2%	TRUE
32.04	Sweetwater & National City	\$29,392	\$21,633	FALSE	1,531	1,414	117	7.6%	8.2%	FALSE
32.07	Sweetwater, National City, Chula Vista	\$39,502	\$21,633	FALSE	2,814	2,687	127	4.5%	8.2%	FALSE
32.08	Skyline- Paradise Hills	\$20,927	\$21,633	TRUE	3,224	3,026	198	6.1%	8.2%	FALSE
32.09	Skyline- Paradise Hills	\$22,129	\$21,633	FALSE	2,185	2,118	67	3.1%	8.2%	FALSE

32.11	Skyline- Paradise Hills	\$22,349	\$21,633	FALSE	1,628	1,459	169	10.4%	8.2%	TRUE
32.12	Skyline- Paradise Hills	\$24,327	\$21,633	FALSE	2,190	2,078	112	5.1%	8.2%	FALSE
32.13	Skyline- Paradise Hills Spring Valley & Skyline-	\$23,317	\$21,633	FALSE	2,373	2,143	230	9.7%	8.2%	TRUE
32.14	Paradise Hills Southeastern SD & County	\$23,488	\$21,633	FALSE	2,259	2,016	243	10.8%	8.2%	TRUE
33.01	Islands	\$10,976	\$21,633	TRUE	1,365	1,206	159	11.6%	8.2%	TRUE
33.02	Encanto Southeastern	\$14,646	\$21,633	TRUE	4,439	4,084	355	8.0%	8.2%	FALSE
33.03	SD	\$11,209	\$21,633	TRUE	1,455	1,248	207	14.2%	8.2%	TRUE
34.01	City Heights & Eastern Area Southeastern	\$19,063	\$21,633	TRUE	2,344	2,023	321	13.7%	8.2%	TRUE
34.03	SD	\$11,746	\$21,633	TRUE	1,629	1,543	86	5.3%	8.2%	FALSE
34.04	Encanto Southeastern	\$11,759	\$21,633	TRUE	2,090	1,827	263	12.6%	8.2%	TRUE
35.01	SD	\$8,576	\$21,633	TRUE	1,537	1,428	109	7.1%	8.2%	FALSE
35.02	Southeastern SD	\$11,167	\$21,633	TRUE	1,787	1,632	155	8.7%	8.2%	TRUE
36.01	Southeastern & Barrio Logan	\$9,597	\$21,633	TRUE	1,070	978	92	8.6%	8.2%	TRUE
36.02	Southeastern SD	\$10,131	\$21,633	TRUE	1,439	1,193	246	17.1%	8.2%	TRUE
36.03	Southeastern SD	\$12,509	\$21,633	TRUE	1,751	1,572	179	10.2%	8.2%	TRUE
38.00	32nd Street Naval Station Southeastern	\$33,567	\$21,633	FALSE	846	846	-	0.0%	8.2%	FALSE
39.01	SD	\$7,613	\$21,633	TRUE	1,759	1,498	261	14.8%	8.2%	TRUE
39.02	Southeastern SD & Barrio Logan	\$11,948	\$21,633	TRUE	1,822	1,601	221	12.1%	8.2%	TRUE
40.00	Southeastern SD	\$13,012	\$21,633	TRUE	1,559	1,414	145	9.3%	8.2%	TRUE
41.00	Golden Hill & Southeastern SD	\$19,456	\$21,633	TRUE	2,733	2,608	125	4.6%	8.2%	FALSE
42.00	Golden Hill	\$38,276	\$21,633	FALSE	3,177	3,025	152	4.8%	8.2%	FALSE
43.00	North Park	\$33,913	\$21,633	FALSE	2,962	2,806	156	5.3%	8.2%	FALSE
44.00	Golden Hill	\$32,467	\$21,633	FALSE	2,485	2,391	94	3.8%	8.2%	FALSE
45.01	Golden Hill Golden Hill & Southeastern	\$21,887	\$21,633	FALSE	2,105	1,974	131	6.2%	8.2%	FALSE
45.02	SD	\$16,169	\$21,633	TRUE	928	857	71	7.7%	8.2%	FALSE
46.00	Golden Hill & Southeastern SD	\$30,460	\$21,633	FALSE	1,333	1,288	45	3.4%	8.2%	FALSE
47.00	Southern SD	\$12,083	\$21,633	TRUE	871	766	105	12.1%	8.2%	TRUE
48.00	Southern SD	\$10,666	\$21,633	TRUE	1,948	1,722	226	11.6%	8.2%	TRUE
49.00	Southern SD	\$14,955	\$21,633	TRUE	1,878	1,696	182	9.7%	8.2%	TRUE
50.00	Barrio Logan	\$8,979	\$21,633	TRUE	704	673	31	4.4%	8.2%	FALSE

51.00	Barrio Logan & Downtown	\$27,281	\$21,633	FALSE	2,728	2,155	573	21.0%	8.2%	TRUE
52.00	Downtown	\$25,803	\$21,633	FALSE	2,171	2,012	159	7.3%	8.2%	FALSE
53.00	Downtown	\$34,559	\$21,633	FALSE	1,856	1,795	61	3.3%	8.2%	FALSE
54.00	Downtown	\$80,705	\$21,633	FALSE	4,193	4,099	94	2.2%	8.2%	FALSE
55.00	Balboa Park	\$23,265	\$21,633	FALSE	-	-	-	-	8.2%	TRUE
56.00	Balboa Park & Downtown	\$52,353	\$21,633	FALSE	2,123	2,026	97	4.6%	8.2%	FALSE
57.00	Uptown	\$29,902	\$21,633	FALSE	723	657	66	9.1%	8.2%	TRUE
58.00	Downtown	\$56,620	\$21,633	FALSE	1,822	1,782	40	2.2%	8.2%	FALSE
59.00	Uptown	\$38,894	\$21,633	FALSE	1,946	1,826	120	6.2%	8.2%	FALSE
60.00	Uptown	\$58,111	\$21,633	FALSE	1,948	1,813	135	6.9%	8.2%	FALSE
61.00	Uptown & Midway-Pacific Highway	\$45,787	\$21,633	FALSE	1,507	1,420	87	5.8%	8.2%	FALSE
62.00	Lindbergh Field	-	\$21,633	FALSE	11	11	-	0.0%	8.2%	FALSE
63.00	Lindbergh Field & Peninsula	\$14,842	\$21,633	TRUE	206	206	-	0.0%	8.2%	FALSE
64.00	Peninsula	\$32,303	\$21,633	FALSE	794	776	18	2.3%	8.2%	FALSE
65.00	Midway-Pacific Hwy & Old San Diego	\$25,905	\$21,633	FALSE	1,484	1,125	359	24.2%	8.2%	TRUE
66.00	Midway-Pacific Highway	\$11,757	\$21,633	TRUE	321	276	45	14.0%	8.2%	TRUE
68.01	Ocean Beach & Peninsula	\$31,958	\$21,633	FALSE	1,605	1,484	121	7.5%	8.2%	FALSE
68.02	Midway-Pacific Hwy & Peninsula	\$24,856	\$21,633	FALSE	2,723	2,591	132	4.8%	8.2%	FALSE
69.00	Peninsula	\$44,604	\$21,633	FALSE	3,071	2,975	96	3.1%	8.2%	FALSE
70.01	Peninsula	\$31,778	\$21,633	FALSE	2,284	2,130	154	6.7%	8.2%	FALSE
70.02	Peninsula	\$52,364	\$21,633	FALSE	1,384	1,329	55	4.0%	8.2%	FALSE
71.00	Peninsula	\$77,147	\$21,633	FALSE	1,967	1,934	33	1.7%	8.2%	FALSE
72.00	Peninsula	\$38,055	\$21,633	FALSE	2,487	2,366	121	4.9%	8.2%	FALSE
73.01	Ocean Beach	\$38,720	\$21,633	FALSE	4,397	4,224	173	3.9%	8.2%	FALSE
73.02	Peninsula	\$52,747	\$21,633	FALSE	1,160	1,102	58	5.0%	8.2%	FALSE
74.00	Peninsula	\$37,464	\$21,633	FALSE	4,086	3,896	190	4.7%	8.2%	FALSE
75.01	Mission Bay Park & Ocean Beach	\$30,685	\$21,633	FALSE	3,148	3,017	131	4.2%	8.2%	FALSE
75.02	Ocean Beach	\$38,521	\$21,633	FALSE	2,280	2,138	142	6.2%	8.2%	FALSE
89.02	Mission Valley	\$42,700	\$21,633	FALSE	1,479	1,471	8	0.5%	8.2%	FALSE
93.04	Mission Valley	\$42,292	\$21,633	FALSE	4,747	4,552	195	4.1%	8.2%	FALSE
99.01	Peninsula	\$28,375	\$21,633	FALSE	20	20	-	0.0%	8.2%	FALSE
99.02	Harbor	\$17,316	\$21,633	TRUE	-	-	-	-	8.2%	TRUE
100.01	Otay Mesa-Nestor	\$21,863	\$21,633	FALSE	2,199	2,038	161	7.3%	8.2%	FALSE
100.0	Otay Mesa-	\$18,850	\$21,633	TRUE	2,589	2,286	303	11.7%	8.2%	TRUE

3	Nestor									
100.0	Otay Mesa-									
4	Nestor	\$17,290	\$21,633	TRUE	1,874	1,750	124	6.6%	8.2%	FALSE
100.0	San Ysidro	\$12,938	\$21,633	TRUE	3,204	2,863	341	10.6%	8.2%	TRUE
5	San Ysidro & Tijuana River Valley	\$14,451	\$21,633	TRUE	2,448	2,233	215	8.8%	8.2%	TRUE
100.0	Otay Mesa-	\$17,338	\$21,633	TRUE	2,646	2,494	152	5.7%	8.2%	FALSE
100.1	Nestor	\$17,306	\$21,633	TRUE	1,666	1,471	195	11.7%	8.2%	TRUE
100.1	Otay Mesa-	\$16,008	\$21,633	TRUE	2,155	2,086	69	3.2%	8.2%	FALSE
100.1	Nestor	\$10,240	\$21,633	TRUE	1,680	1,481	199	11.8%	8.2%	TRUE
100.1	San Ysidro	\$18,589	\$21,633	TRUE	5,277	4,962	315	6.0%	8.2%	FALSE
100.1	San Ysidro & Chula Vista & Otay Mesa & Otay	\$14,661	\$21,633	TRUE	886	772	114	12.9%	8.2%	TRUE
101.0	Otay Mesa-	\$14,224	\$21,633	TRUE	2,421	2,273	148	6.1%	8.2%	FALSE
101.0	Nestor	\$25,903	\$21,633	FALSE	1,423	1,350	73	5.1%	8.2%	FALSE
101.0	Otay Mesa-	\$16,424	\$21,633	TRUE	2,381	2,179	202	8.5%	8.2%	TRUE
101.0	Nestor	\$18,482	\$21,633	TRUE	2,771	2,516	255	9.2%	8.2%	TRUE
101.0	Chula Vista Tijuana River Valley	\$19,656	\$21,633	TRUE	2,074	1,874	200	9.6%	8.2%	TRUE
101.1	Otay Mesa-	\$17,167	\$21,633	TRUE	2,944	2,787	157	5.3%	8.2%	FALSE
101.1	Nestor	\$13,703	\$21,633	TRUE	1,208	1,143	65	5.4%	8.2%	FALSE
101.1	San Ysidro	\$11,902	\$21,633	TRUE	2,033	1,807	226	11.1%	8.2%	TRUE
102.0	Imperial Beach	\$24,611	\$21,633	FALSE	4,074	3,704	370	9.1%	8.2%	TRUE
103.0	Imperial Beach	\$25,142	\$21,633	FALSE	2,289	2,187	102	4.5%	8.2%	FALSE
104.0	Imperial Beach	\$15,816	\$21,633	TRUE	1,088	1,000	88	8.1%	8.2%	FALSE
104.0	Imperial Beach	\$16,761	\$21,633	TRUE	2,362	2,087	275	11.6%	8.2%	TRUE
105.0	Imperial Beach	\$27,669	\$21,633	FALSE	553	537	16	2.9%	8.2%	FALSE
105.0	Imperial Beach	\$19,854	\$21,633	TRUE	2,326	2,186	140	6.0%	8.2%	FALSE
106.0	Coronado	\$52,867	\$21,633	FALSE	831	824	7	0.8%	8.2%	FALSE
106.0	Coronado	\$31,355	\$21,633	FALSE	522	413	109	20.9%	8.2%	TRUE
106.0	Coronado	\$100,053	\$21,633	FALSE	304	304	-	0.0%	8.2%	FALSE
107.0	Coronado	\$98,124	\$21,633	FALSE	465	449	16	3.4%	8.2%	FALSE
108.0	Coronado	\$53,933	\$21,633	FALSE	1,310	1,217	93	7.1%	8.2%	FALSE

109.0 0	Coronado	\$46,954	\$21,633	FALSE	877	840	37	4.2%	8.2%	FALSE
110.0 0	Coronado	\$46,930	\$21,633	FALSE	1,385	1,301	84	6.1%	8.2%	FALSE
111.0 0	Coronado	\$49,689	\$21,633	FALSE	1,832	1,740	92	5.0%	8.2%	FALSE
112.0 0	Coronado	\$50,465	\$21,633	FALSE	499	485	14	2.8%	8.2%	FALSE
113.0 0	Coronado & Harbor	\$23,374	\$21,633	FALSE	83	83	-	0.0%	8.2%	FALSE
114.0 0	National City	\$27,979	\$21,633	FALSE	620	546	74	11.9%	8.2%	TRUE
115.0 0	National City	\$10,348	\$21,633	TRUE	465	258	207	44.5%	8.2%	TRUE
116.0 1	National City	\$10,936	\$21,633	TRUE	2,507	2,151	356	14.2%	8.2%	TRUE
116.0 2	National City	\$14,033	\$21,633	TRUE	1,516	1,401	115	7.6%	8.2%	FALSE
117.0 0	National City	\$13,931	\$21,633	TRUE	2,440	2,036	404	16.6%	8.2%	TRUE
118.0 1	National City	\$14,780	\$21,633	TRUE	1,432	1,306	126	8.8%	8.2%	TRUE
118.0 2	National City	\$10,904	\$21,633	TRUE	2,748	2,518	230	8.4%	8.2%	TRUE
119.0 1	National City	\$15,642	\$21,633	TRUE	631	575	56	8.9%	8.2%	TRUE
119.0 2	National City	\$19,432	\$21,633	TRUE	2,025	1,917	108	5.3%	8.2%	FALSE
120.0 1	National City	\$14,242	\$21,633	TRUE	961	829	132	13.7%	8.2%	TRUE
120.0 2	National City	\$13,138	\$21,633	TRUE	1,325	1,174	151	11.4%	8.2%	TRUE
120.0 3	National City	\$16,504	\$21,633	TRUE	1,133	1,077	56	4.9%	8.2%	FALSE
121.0 1	National City	\$19,261	\$21,633	TRUE	946	858	88	9.3%	8.2%	TRUE
121.0 2	National City National City & County Islands	\$18,357	\$21,633	TRUE	1,083	971	112	10.3%	8.2%	TRUE
122		\$11,555	\$21,633	TRUE	1,207	1,148	59	4.9%	8.2%	FALSE
123.0 2	Chula Vista	\$24,312	\$21,633	FALSE	636	586	50	7.9%	8.2%	FALSE
123.0 3	Chula Vista	\$28,086	\$21,633	FALSE	1,385	1,320	65	4.7%	8.2%	FALSE
123.0 4	Chula Vista	\$35,757	\$21,633	FALSE	1,625	1,497	128	7.9%	8.2%	FALSE
124.0 1	Chula Vista	\$19,407	\$21,633	TRUE	1,487	1,380	107	7.2%	8.2%	FALSE
124.0 2	Chula Vista	\$19,831	\$21,633	TRUE	2,537	2,309	228	9.0%	8.2%	TRUE
125.0 0	Chula Vista	\$13,965	\$21,633	TRUE	2,852	2,536	316	11.1%	8.2%	TRUE
126.0 0	Chula Vista	\$19,536	\$21,633	TRUE	2,070	1,867	203	9.8%	8.2%	TRUE
127.0 0	Chula Vista	\$15,237	\$21,633	TRUE	2,040	1,803	237	11.6%	8.2%	TRUE
128.0 0	Chula Vista	\$22,649	\$21,633	FALSE	1,410	1,220	190	13.5%	8.2%	TRUE
129.0	Chula Vista	\$27,303	\$21,633	FALSE	1,681	1,586	95	5.7%	8.2%	FALSE

0										
130.0										
0	Chula Vista	\$20,772	\$21,633	TRUE	2,205	1,966	239	10.8%	8.2%	TRUE
131.0										
2	Chula Vista	\$17,399	\$21,633	TRUE	2,232	2,111	121	5.4%	8.2%	FALSE
131.0										
3	Chula Vista	\$13,715	\$21,633	TRUE	846	779	67	7.9%	8.2%	FALSE
131.0										
4	Chula Vista	\$16,097	\$21,633	TRUE	2,643	2,450	193	7.3%	8.2%	FALSE
132.0										
3	Chula Vista	\$16,902	\$21,633	TRUE	3,145	2,976	169	5.4%	8.2%	FALSE
132.0										
4	Chula Vista Chula Vista & Otay Mesa- Nestor	\$12,464	\$21,633	TRUE	1,693	1,371	322	19.0%	8.2%	TRUE
132.0										
5	Chula Vista	\$18,782	\$21,633	TRUE	1,338	1,236	102	7.6%	8.2%	FALSE
132.0										
6	Chula Vista	\$14,362	\$21,633	TRUE	2,043	1,834	209	10.2%	8.2%	TRUE
133.0										
1	Otay Mesa- Nestor	\$19,903	\$21,633	TRUE	2,515	2,224	291	11.6%	8.2%	TRUE
133.0										
2	Chula Vista	\$21,893	\$21,633	FALSE	2,179	2,001	178	8.2%	8.2%	FALSE
133.0										
3	Chula Vista	\$17,721	\$21,633	TRUE	2,024	1,860	164	8.1%	8.2%	FALSE
133.0										
6	Chula Vista	\$18,654	\$21,633	TRUE	1,948	1,742	206	10.6%	8.2%	TRUE
133.0										
7	Chula Vista Chula Vista & Otay Mesa- Nestor	\$20,973	\$21,633	TRUE	1,553	1,458	95	6.1%	8.2%	FALSE
133.0										
8	Chula Vista	\$16,319	\$21,633	TRUE	1,743	1,620	123	7.1%	8.2%	FALSE
133.0										
9	Chula Vista	\$26,521	\$21,633	FALSE	3,011	2,820	191	6.3%	8.2%	FALSE
133.1										
Chula Vista	\$26,688	\$21,633	FALSE	11,863	11,295	568	4.8%	8.2%	FALSE	
133.1										
1	Chula Vista	\$31,491	\$21,633	FALSE	4,126	3,995	131	3.2%	8.2%	FALSE
133.1										
2	Chula Vista	\$18,102	\$21,633	TRUE	1,080	1,006	74	6.9%	8.2%	FALSE
133.1										
3	Chula Vista & Otay	\$29,852	\$21,633	FALSE	8,101	7,729	372	4.6%	8.2%	FALSE
134.0										
1	Chula Vista & Sweetwater	\$27,797	\$21,633	FALSE	2,035	1,744	291	14.3%	8.2%	TRUE
134.0										
9	Chula Vista	\$27,033	\$21,633	FALSE	2,279	2,065	214	9.4%	8.2%	TRUE
134.1										
Chula Vista	\$32,560	\$21,633	FALSE	3,143	2,817	326	10.4%	8.2%	TRUE	
134.1										
1	Chula Vista & Sweetwater	\$41,182	\$21,633	FALSE	2,200	2,085	115	5.2%	8.2%	FALSE
134.1										
2	Chula Vista & Sweetwater	\$39,092	\$21,633	FALSE	2,322	2,229	93	4.0%	8.2%	FALSE
134.1										
3	Chula Vista	\$35,755	\$21,633	FALSE	3,930	3,661	269	6.8%	8.2%	FALSE
134.1										
4	Chula Vista	\$29,071	\$21,633	FALSE	3,072	2,839	233	7.6%	8.2%	FALSE
134.1										
5	Chula Vista	\$29,003	\$21,633	FALSE	717	684	33	4.6%	8.2%	FALSE
134.1										
6	Chula Vista	\$30,814	\$21,633	FALSE	1,628	1,549	79	4.9%	8.2%	FALSE
134.1										
7	Chula Vista & Sweetwater	\$27,306	\$21,633	FALSE	1,291	1,081	210	16.3%	8.2%	TRUE

134.1 8	Chula Vista	\$26,281	\$21,633	FALSE	2,832	2,694	138	4.9%	8.2%	FALSE
134.1 9	Chula Vista Spring Valley & Valle de Oro	\$32,528	\$21,633	FALSE	3,685	3,447	238	6.5%	8.2%	FALSE
135.0 3	Spring Valley Spring Valley & Valle de Oro	\$29,327	\$21,633	FALSE	2,731	2,438	293	10.7%	8.2%	TRUE
135.0 4	Spring Valley Spring Valley & Valle de Oro	\$25,832	\$21,633	FALSE	1,555	1,496	59	3.8%	8.2%	FALSE
135.0 5	Spring Valley Spring Valley & Valle de Oro	\$32,249	\$21,633	FALSE	2,276	2,119	157	6.9%	8.2%	FALSE
135.0 6	Valle de Oro	\$23,700	\$21,633	FALSE	1,431	1,248	183	12.8%	8.2%	TRUE
136.0 1	Valle de Oro	\$28,485	\$21,633	FALSE	2,555	2,322	233	9.1%	8.2%	TRUE
136.0 4	Valle de Oro	\$34,192	\$21,633	FALSE	3,370	3,112	258	7.7%	8.2%	FALSE
136.0 5	Valle de Oro	\$52,383	\$21,633	FALSE	2,900	2,811	89	3.1%	8.2%	FALSE
136.0 6	Valle de Oro	\$29,382	\$21,633	FALSE	3,024	2,804	220	7.3%	8.2%	FALSE
137.0 1	Valle de Oro	\$35,148	\$21,633	FALSE	1,263	1,147	116	9.2%	8.2%	TRUE
137.0 2	Spring Valley	\$23,166	\$21,633	FALSE	2,364	2,072	292	12.4%	8.2%	TRUE
138.0 1	La Mesa & Spring Valley	\$23,107	\$21,633	FALSE	2,265	2,119	146	6.4%	8.2%	FALSE
138.0 2	Spring Valley	\$17,538	\$21,633	TRUE	1,268	1,081	187	14.7%	8.2%	TRUE
139.0 3	Spring Valley	\$28,348	\$21,633	FALSE	1,845	1,702	143	7.8%	8.2%	FALSE
139.0 5	Spring Valley	\$26,937	\$21,633	FALSE	1,765	1,667	98	5.6%	8.2%	FALSE
139.0 6	Spring Valley	\$24,387	\$21,633	FALSE	2,161	2,032	129	6.0%	8.2%	FALSE
139.0 7	Spring Valley	\$14,144	\$21,633	TRUE	1,558	1,387	171	11.0%	8.2%	TRUE
139.0 8	Spring Valley	\$15,779	\$21,633	TRUE	1,496	1,118	378	25.3%	8.2%	TRUE
139.0 9	Spring Valley	\$20,071	\$21,633	TRUE	2,288	1,911	377	16.5%	8.2%	TRUE
140.0 1	Lemon Grove Lemon Grove & Spring Valley	\$26,472	\$21,633	FALSE	2,106	2,023	83	3.9%	8.2%	FALSE
140.0 2	Lemon Grove Lemon Grove & Spring Valley	\$22,761	\$21,633	FALSE	1,923	1,839	84	4.4%	8.2%	FALSE
141.0 1	Lemon Grove Skyline- Paradise Hills	\$21,312	\$21,633	TRUE	1,884	1,795	89	4.7%	8.2%	FALSE
141.0 2	Lemon Grove Skyline- Paradise Hills	\$19,434	\$21,633	TRUE	2,042	1,948	94	4.6%	8.2%	FALSE
142.0 0	Lemon Grove	\$20,806	\$21,633	TRUE	2,445	2,196	249	10.2%	8.2%	TRUE
143.0 0	Lemon Grove	\$23,054	\$21,633	FALSE	1,594	1,491	103	6.5%	8.2%	FALSE
144.0 0	Lemon Grove	\$17,732	\$21,633	TRUE	1,390	1,193	197	14.2%	8.2%	TRUE
145.0 0	La Mesa	\$20,737	\$21,633	TRUE	2,093	1,908	185	8.8%	8.2%	TRUE

146.0 1	La Mesa	\$26,098	\$21,633	FALSE	2,440	2,297	143	5.9%	8.2%	FALSE
146.0 2	La Mesa	\$32,270	\$21,633	FALSE	1,898	1,707	191	10.1%	8.2%	TRUE
147.0 0	La Mesa	\$32,238	\$21,633	FALSE	4,161	3,866	295	7.1%	8.2%	FALSE
148.0 1	La Mesa	\$27,675	\$21,633	FALSE	3,350	3,034	316	9.4%	8.2%	TRUE
148.0 3	La Mesa	\$24,513	\$21,633	FALSE	2,499	2,375	124	5.0%	8.2%	FALSE
148.0 4	La Mesa	\$31,873	\$21,633	FALSE	2,244	2,013	231	10.3%	8.2%	TRUE
149.0 0	La Mesa	\$29,105	\$21,633	FALSE	4,009	3,837	172	4.3%	8.2%	FALSE
150.0 0	La Mesa	\$25,706	\$21,633	FALSE	2,753	2,505	248	9.0%	8.2%	TRUE
151.0 0	La Mesa	\$31,650	\$21,633	FALSE	2,426	2,251	175	7.2%	8.2%	FALSE
152.0 0	La Mesa & Valle de Oro	\$56,102	\$21,633	FALSE	1,723	1,632	91	5.3%	8.2%	FALSE
153.0 1	El Cajon	\$16,023	\$21,633	TRUE	1,510	1,251	259	17.2%	8.2%	TRUE
153.0 2	El Cajon	\$39,201	\$21,633	FALSE	1,662	1,573	89	5.4%	8.2%	FALSE
154.0 3	El Cajon & Valle de Oro	\$47,117	\$21,633	FALSE	1,131	1,115	16	1.4%	8.2%	FALSE
154.0 4	El Cajon & Valle de Oro	\$21,979	\$21,633	FALSE	3,612	3,205	407	11.3%	8.2%	TRUE
154.0 5	El Cajon & Valle de Oro	\$36,008	\$21,633	FALSE	2,615	2,431	184	7.0%	8.2%	FALSE
154.0 6	Crest-Dehesa & Valle de Oro	\$56,996	\$21,633	FALSE	1,187	1,091	96	8.1%	8.2%	FALSE
155.0 1	Crest-Dehesa & Lakeside	\$33,993	\$21,633	FALSE	2,494	2,290	204	8.2%	8.2%	FALSE
155.0 2	Crest-Dehesa & Alpine	\$42,385	\$21,633	FALSE	1,477	1,292	185	12.5%	8.2%	TRUE
156.0 1	Crest-Dehesa & El Cajon	\$21,211	\$21,633	TRUE	2,593	2,328	265	10.2%	8.2%	TRUE
156.0 2	Crest-Dehesa & El Cajon	\$36,343	\$21,633	FALSE	1,244	1,171	73	5.9%	8.2%	FALSE
157.0 1	El Cajon	\$15,035	\$21,633	TRUE	2,247	2,000	247	11.0%	8.2%	TRUE
157.0 3	El Cajon	\$12,870	\$21,633	TRUE	2,587	2,261	326	12.6%	8.2%	TRUE
157.0 4	El Cajon	\$18,199	\$21,633	TRUE	1,865	1,710	155	8.3%	8.2%	TRUE
158.0 1	El Cajon	\$14,005	\$21,633	TRUE	1,333	1,235	98	7.4%	8.2%	FALSE
158.0 2	El Cajon	\$15,723	\$21,633	TRUE	1,984	1,770	214	10.8%	8.2%	TRUE
159.0 1	El Cajon	\$12,101	\$21,633	TRUE	1,571	1,398	173	11.0%	8.2%	TRUE
159.0 2	El Cajon	\$16,131	\$21,633	TRUE	2,335	2,065	270	11.6%	8.2%	TRUE
160.0 0	El Cajon	\$26,512	\$21,633	FALSE	1,333	1,187	146	11.0%	8.2%	TRUE
161.0 0	El Cajon	\$33,658	\$21,633	FALSE	2,940	2,874	66	2.2%	8.2%	FALSE
162.0	El Cajon	\$40,404	\$21,633	FALSE	2,863	2,629	234	8.2%	8.2%	FALSE

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162.0	El Cajon & Lakeside & Santee	\$22,273	\$21,633	FALSE	1,700	1,538	162	9.5%	8.2%	TRUE
163.0	El Cajon	\$17,775	\$21,633	TRUE	2,042	1,856	186	9.1%	8.2%	TRUE
163.0	El Cajon	\$17,474	\$21,633	TRUE	1,967	1,741	226	11.5%	8.2%	TRUE
164.0	El Cajon & Lakeside	\$23,467	\$21,633	FALSE	2,475	2,395	80	3.2%	8.2%	FALSE
164.0	Crest-Dehesa & El Cajon & Lakeside	\$26,545	\$21,633	FALSE	2,813	2,618	195	6.9%	8.2%	FALSE
165.0	El Cajon & Lakeside	\$18,765	\$21,633	TRUE	4,278	3,877	401	9.4%	8.2%	TRUE
165.0	El Cajon & Lakeside	\$19,001	\$21,633	TRUE	2,608	2,380	228	8.7%	8.2%	TRUE
166.0	El Cajon & Santee	\$28,486	\$21,633	FALSE	4,075	3,799	276	6.8%	8.2%	FALSE
166.0	East Elliot & Santee	\$28,928	\$21,633	FALSE	1,796	1,638	158	8.8%	8.2%	TRUE
166.0	Lakeside & Santee	\$27,289	\$21,633	FALSE	3,148	3,018	130	4.1%	8.2%	FALSE
166.0	Lakeside & Santee	\$29,815	\$21,633	FALSE	1,443	1,415	28	1.9%	8.2%	FALSE
166.0	Santee	\$27,281	\$21,633	FALSE	2,823	2,684	139	4.9%	8.2%	FALSE
166.1	Santee	\$26,060	\$21,633	FALSE	2,235	2,123	112	5.0%	8.2%	FALSE
166.1	Santee	\$32,219	\$21,633	FALSE	3,471	3,256	215	6.2%	8.2%	FALSE
166.1	Santee	\$36,824	\$21,633	FALSE	880	863	17	1.9%	8.2%	FALSE
166.1	Santee	\$22,738	\$21,633	FALSE	1,930	1,844	86	4.5%	8.2%	FALSE
166.1	Santee	\$19,761	\$21,633	TRUE	1,028	924	104	10.1%	8.2%	TRUE
166.1	Santee & El Cajon	\$20,583	\$21,633	TRUE	1,464	1,287	177	12.1%	8.2%	TRUE
166.1	Santee	\$27,620	\$21,633	FALSE	1,305	1,224	81	6.2%	8.2%	FALSE
167.0	Lakeside & Santee	\$25,456	\$21,633	FALSE	4,151	3,975	176	4.2%	8.2%	FALSE
167.0	Lakeside	\$23,279	\$21,633	FALSE	3,654	3,391	263	7.2%	8.2%	FALSE
168.0	Lakeside	\$22,075	\$21,633	FALSE	3,572	3,188	384	10.8%	8.2%	TRUE
168.0	Lakeside	\$18,725	\$21,633	TRUE	1,787	1,559	228	12.8%	8.2%	TRUE
168.0	Lakeside	\$29,397	\$21,633	FALSE	3,670	3,358	312	8.5%	8.2%	TRUE
168.0	Crest-Dehesa & Lakeside	\$28,113	\$21,633	FALSE	2,432	2,251	181	7.4%	8.2%	FALSE
168.1	Lakeside	\$32,787	\$21,633	FALSE	1,576	1,499	77	4.9%	8.2%	FALSE
168.1	Lakeside	\$29,138	\$21,633	FALSE	2,129	1,975	154	7.2%	8.2%	FALSE
169.0	Lakeside & Santee	\$31,954	\$21,633	FALSE	3,625	3,431	194	5.4%	8.2%	FALSE
211.0	Mountain Empie &	\$16,823	\$21,633	TRUE	2,723	2,576	147	5.4%	8.2%	FALSE

212.0 2	Central Mountain Alpine & Central Mountain	\$29,069	\$21,633	FALSE	1,285	1,159	126	9.8%	8.2%	TRUE
212.0 3	Alpine	\$33,213	\$21,633	FALSE	4,300	4,045	255	5.9%	8.2%	FALSE
212.0 4	Alpine & Crest-Dehesa	\$43,700	\$21,633	FALSE	2,349	2,277	72	3.1%	8.2%	FALSE
213.0 2	Alpine & Jamul-Dulzura & Otay	\$31,184	\$21,633	FALSE	2,356	2,152	204	8.7%	8.2%	TRUE
213.0 3	Chula Vista & Crest-Dehesa & Jamul- Dulzura &	\$39,278	\$21,633	FALSE	4,006	3,764	242	6.0%	8.2%	FALSE
213.0 4	Valle de Oro Jamul-Dulzura & Otay	\$41,238	\$21,633	FALSE	1,273	1,244	29	2.3%	8.2%	FALSE
CEDS Study Area		\$25,669			672,927	622,148	50,779	7.5%		

Source: U.S. Census, American Community Survey, 2005-2009; compiled by SANDAG
Note: Per capita income in the past 12 months is in 2009 inflation-adjusted dollars