San Diego Regional Forecast Series 15
2022-2060

Population

Employment

Households

San Diego Regional Population

San Diego Regional Population

Population Declining

3.28M persons
- 5th-largest U.S. county
- Slowing growth to 2042, when population declines

Young but Aging

37.3 years median age
- Aging population
- 2060 median age: 42 years

Diversity Increasing

No racial or ethnic majority
- 43% White, 34% Hispanic, 13% Asian, 4% Black
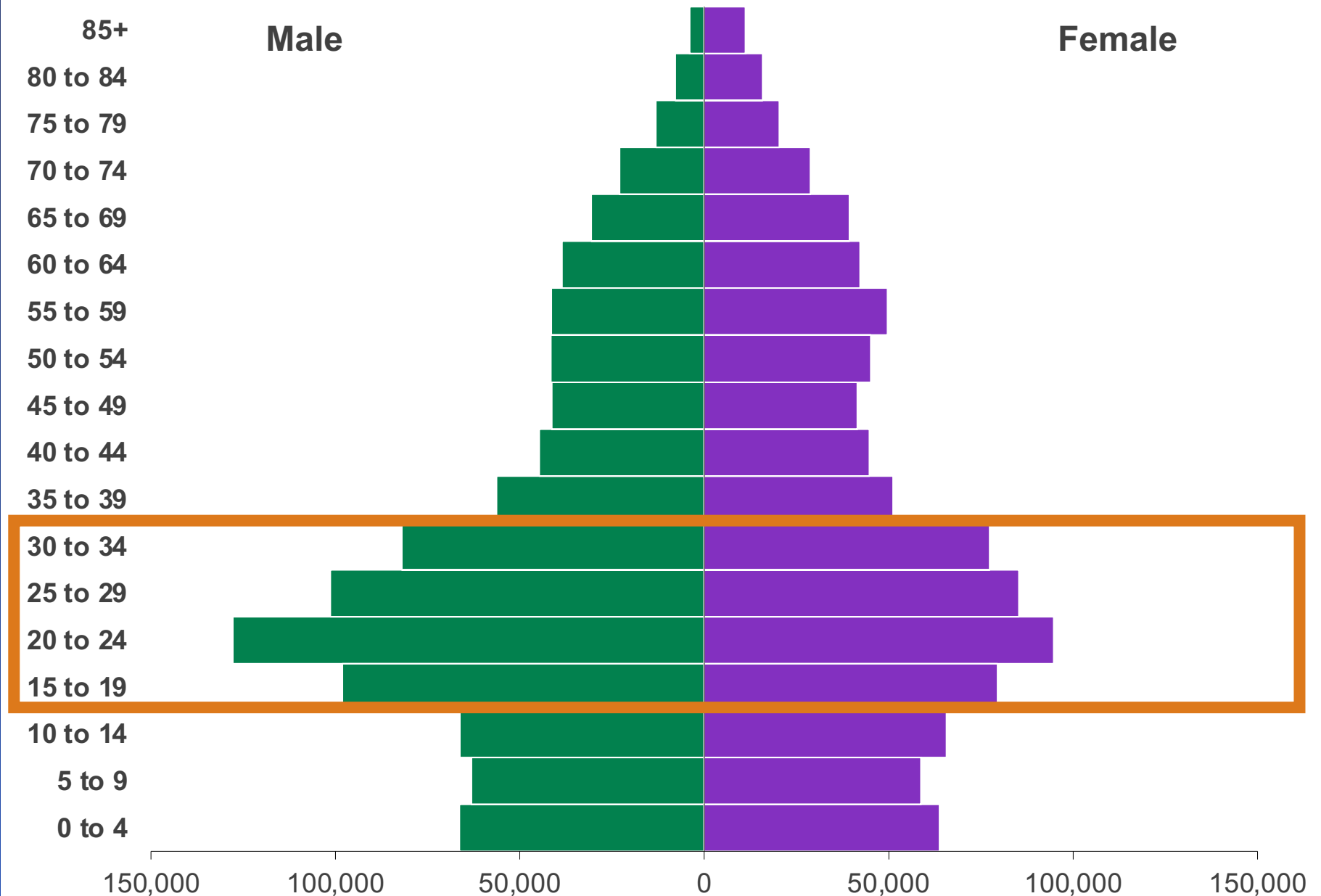- Growing Asian population

San Diego Region

1980 Population
1.86 million

Born between 1946 and 1964, **Baby Boomers** were ages 16 to 34 in 1980 and made up 40% of the population.

The "Great Inflation" from the mid-1970s to mid-1980s created economic hardship and, for many, postponed building a family.

Median age: 28.9 years

Male | **Female**

Age	
85+	
80 to 84	
75 to 79	
70 to 74	
65 to 69	
60 to 64	
55 to 59	
50 to 54	
45 to 49	
40 to 44	
35 to 39	
30 to 34	
25 to 29	
20 to 24	
15 to 19	
10 to 14	
5 to 9	
0 to 4	

150,000   100,000   50,000   0   50,000   100,000   150,000

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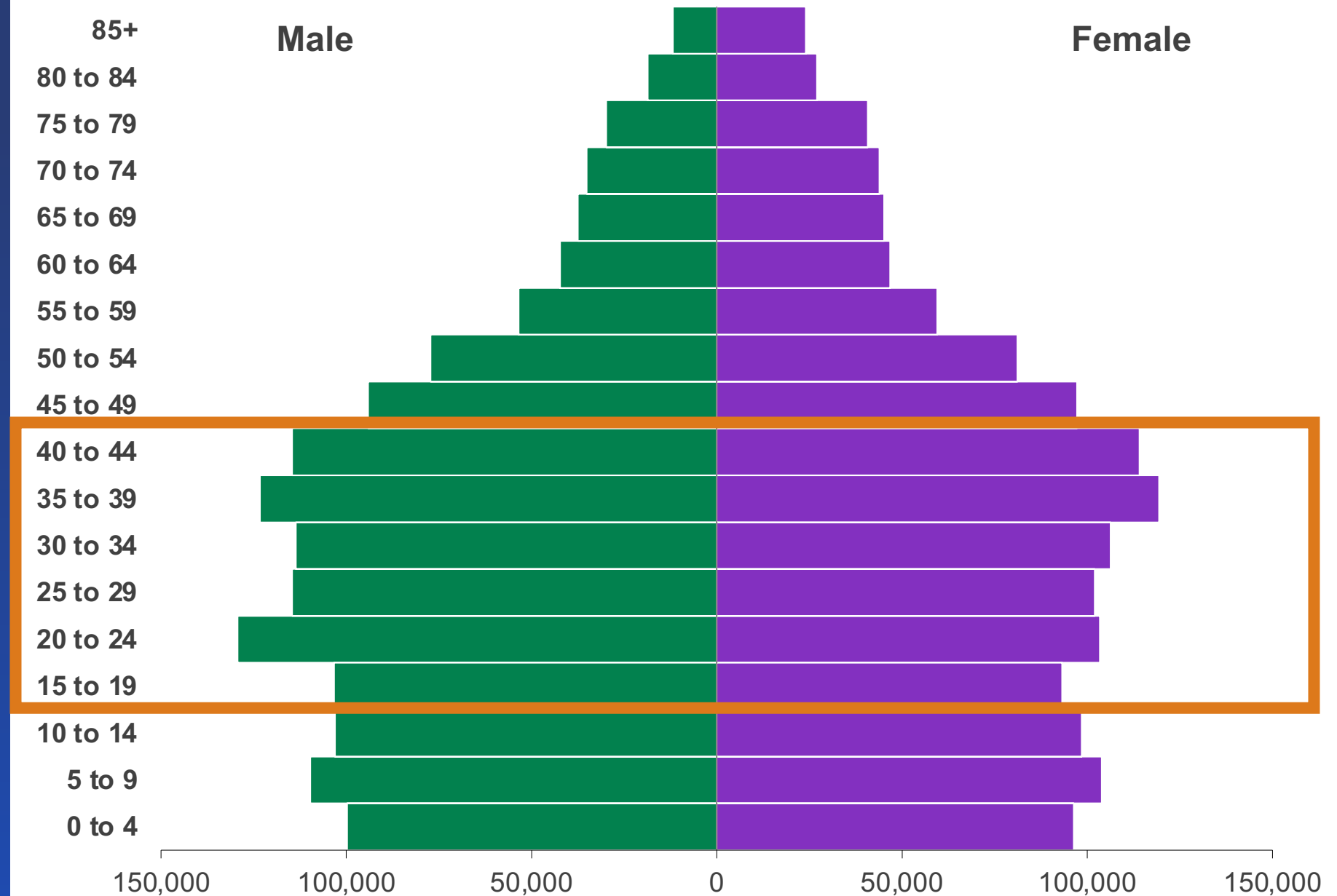# San Diego Region

2000 Population
2.81 million

The late 1980s economic recovery had San Diegans starting families.

1990 fertility rate: 83.8 births per 1,000 women, ages 15-44.

Women were also building careers, delaying childbirth, and having fewer children.

2000 fertility rate: 69.8 births per 1,000 women.

Median age: 33.4 years

Source: IPUMS, 1980; Decennial Census DEC Summary File 3, 2000; County of San Diego, Health and Human Services Agency, Public Health Services, Maternal, Child and Family Health Services
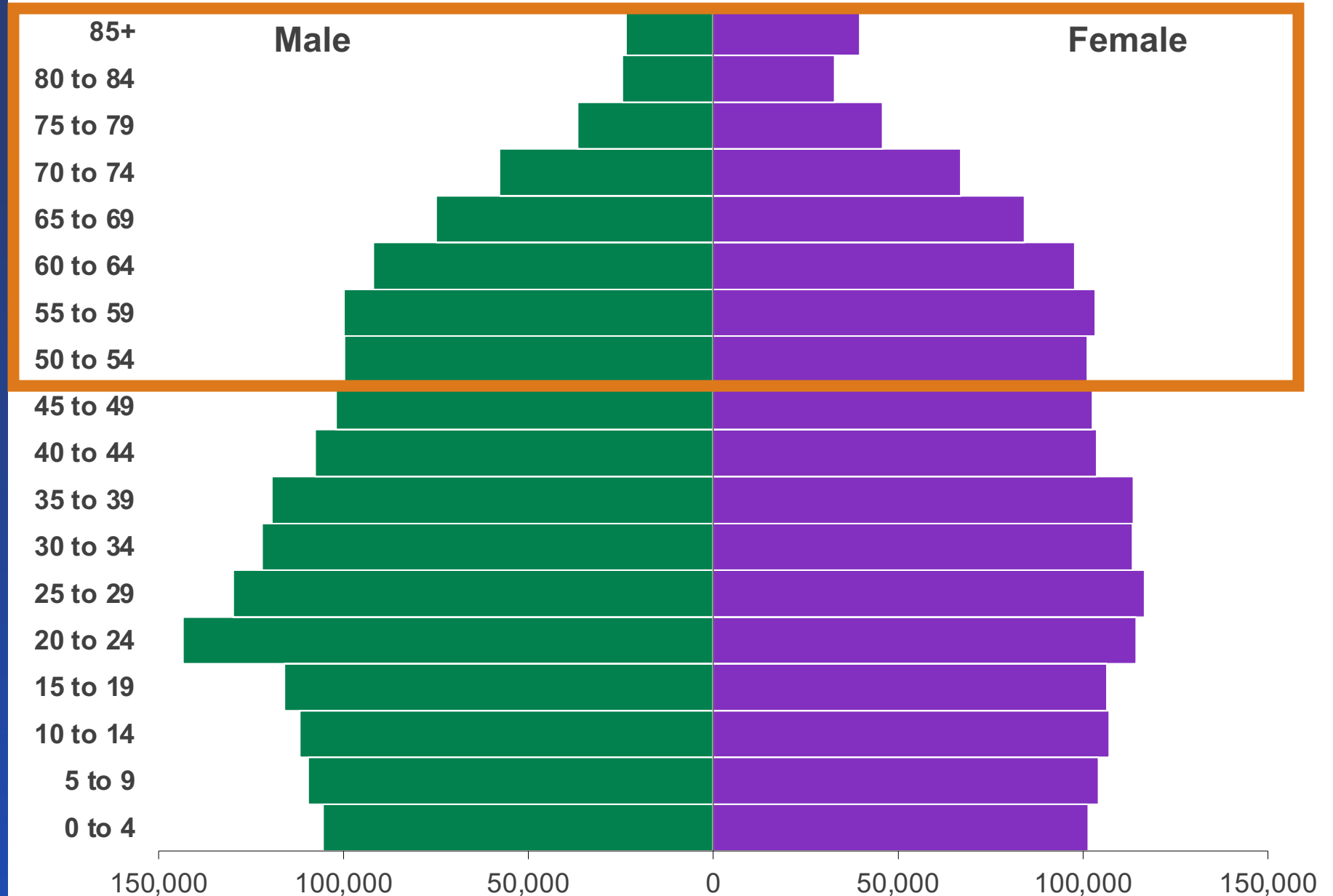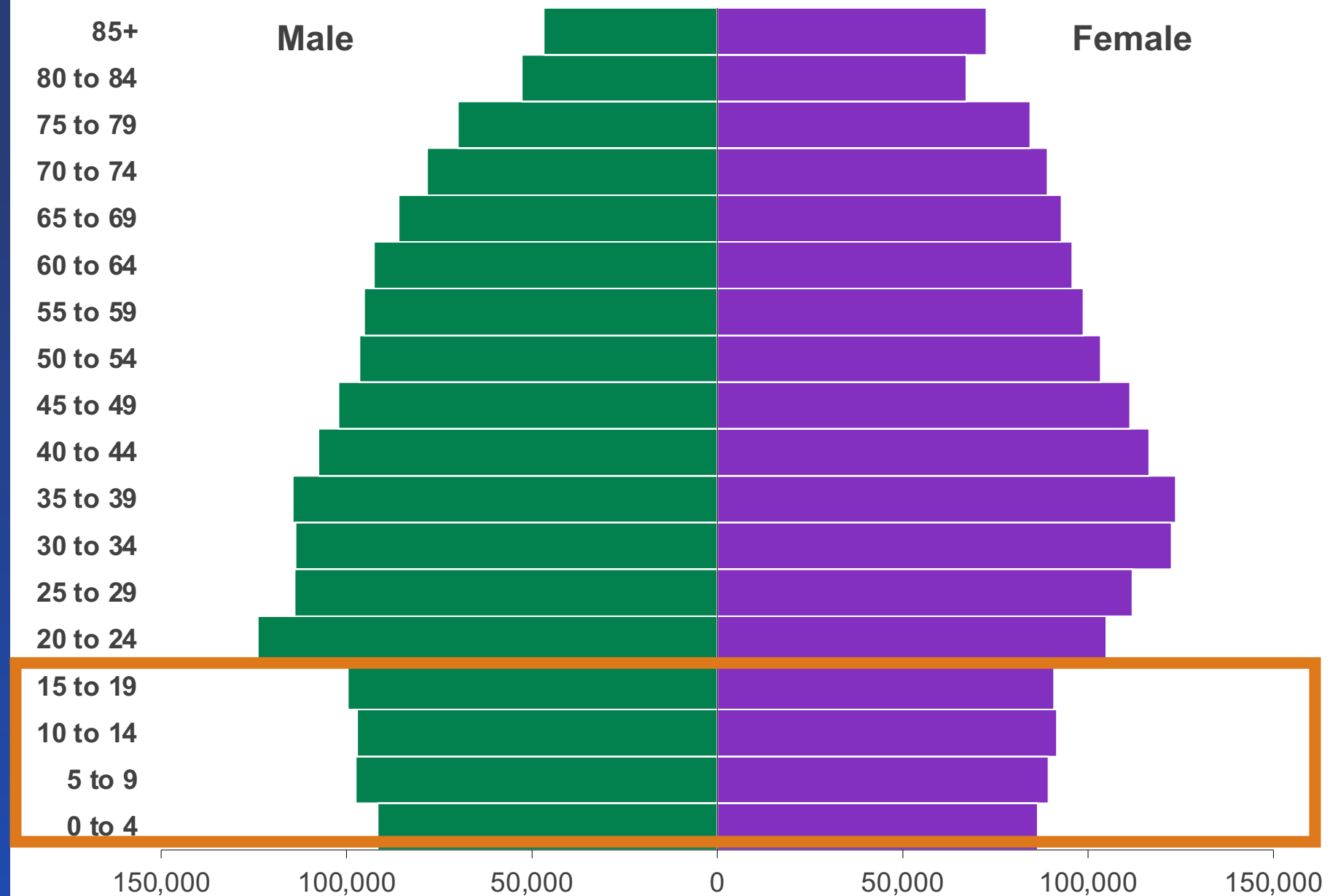
San Diego Regional Forecast

2040 Population
3.43 million

San Diego population is approaching its peak in 2042.

Just 21% of the population is Age 19 or younger.

2040 fertility rate: 51.4 births per 1,000 women

Median age: 40 years

Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060

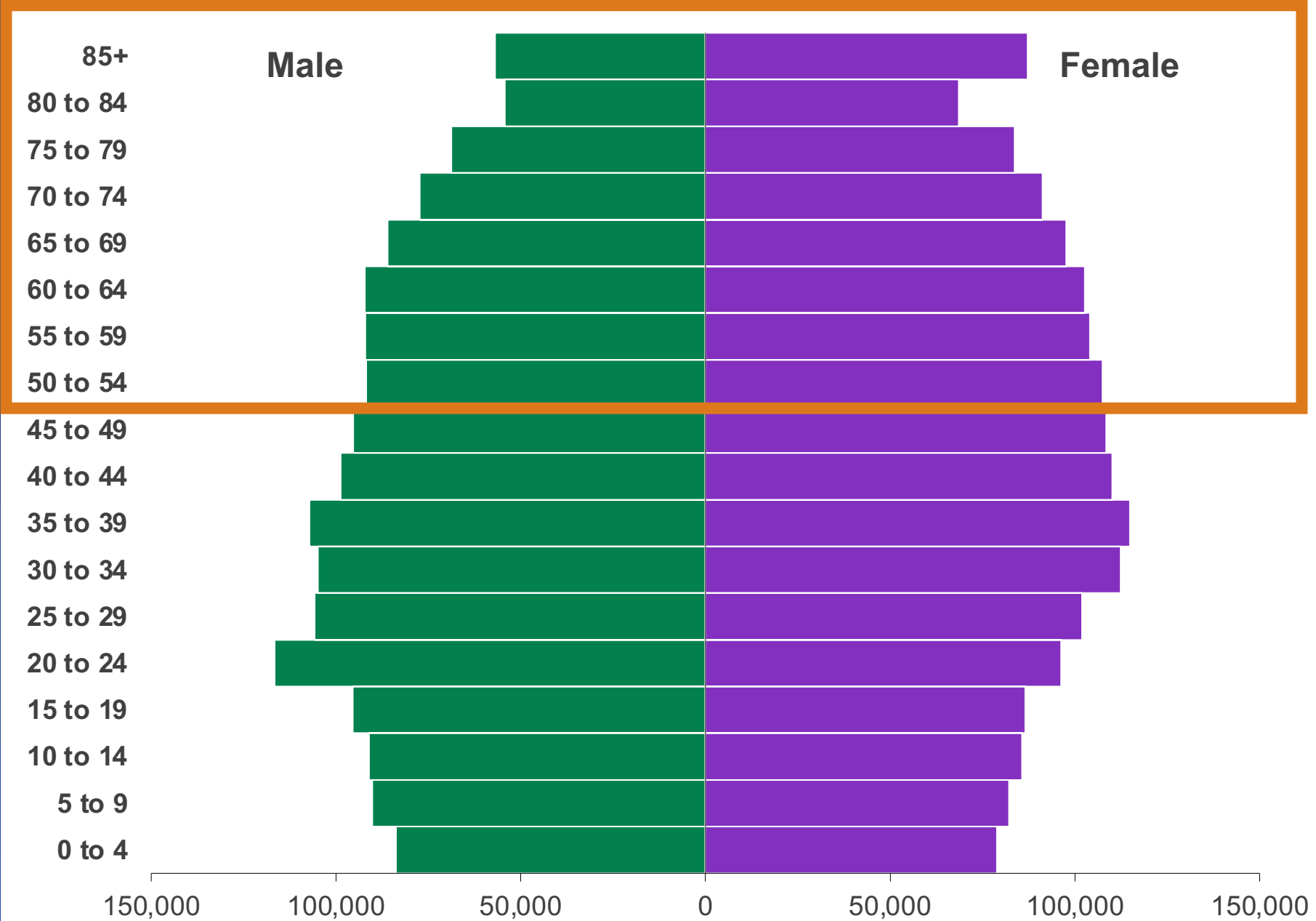# San Diego Regional Forecast

2060 Population
3.33 million

More than 2 in 5 San Diegans will be Age 50 or Older (41%)

Nearly 1 in 4 San Diegans will be Age 65 or Older (23%)

Fertility rate: 51.3

Median age: 42 years

Population pyramid by age group and sex, with axis from 150,000 (Male) to 0 to 150,000 (Female). Age groups from 85+ down to 0 to 4.

San Diego Regional Forecast

Population

From 1990 to 2020, population grew 32%, increasing by nearly 800K.

More than 9,000 persons left the region during and shortly after the pandemic (2020-2022).

Population begins to decrease in 2042.

From 2022 to 2060, population increases just 41K (1.2%).

Population (Millions)

1990
2.50M

2022
3.29M

Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060
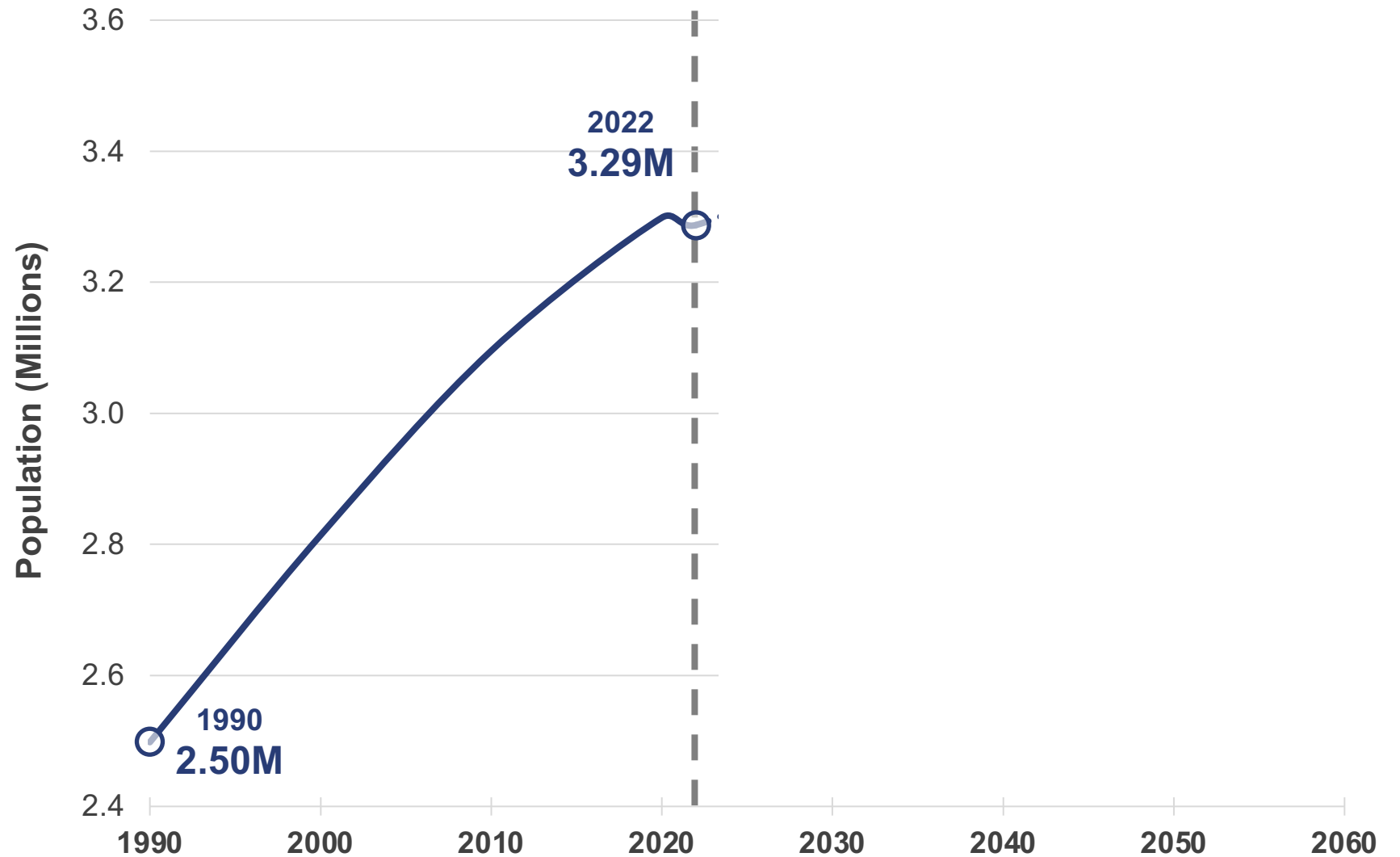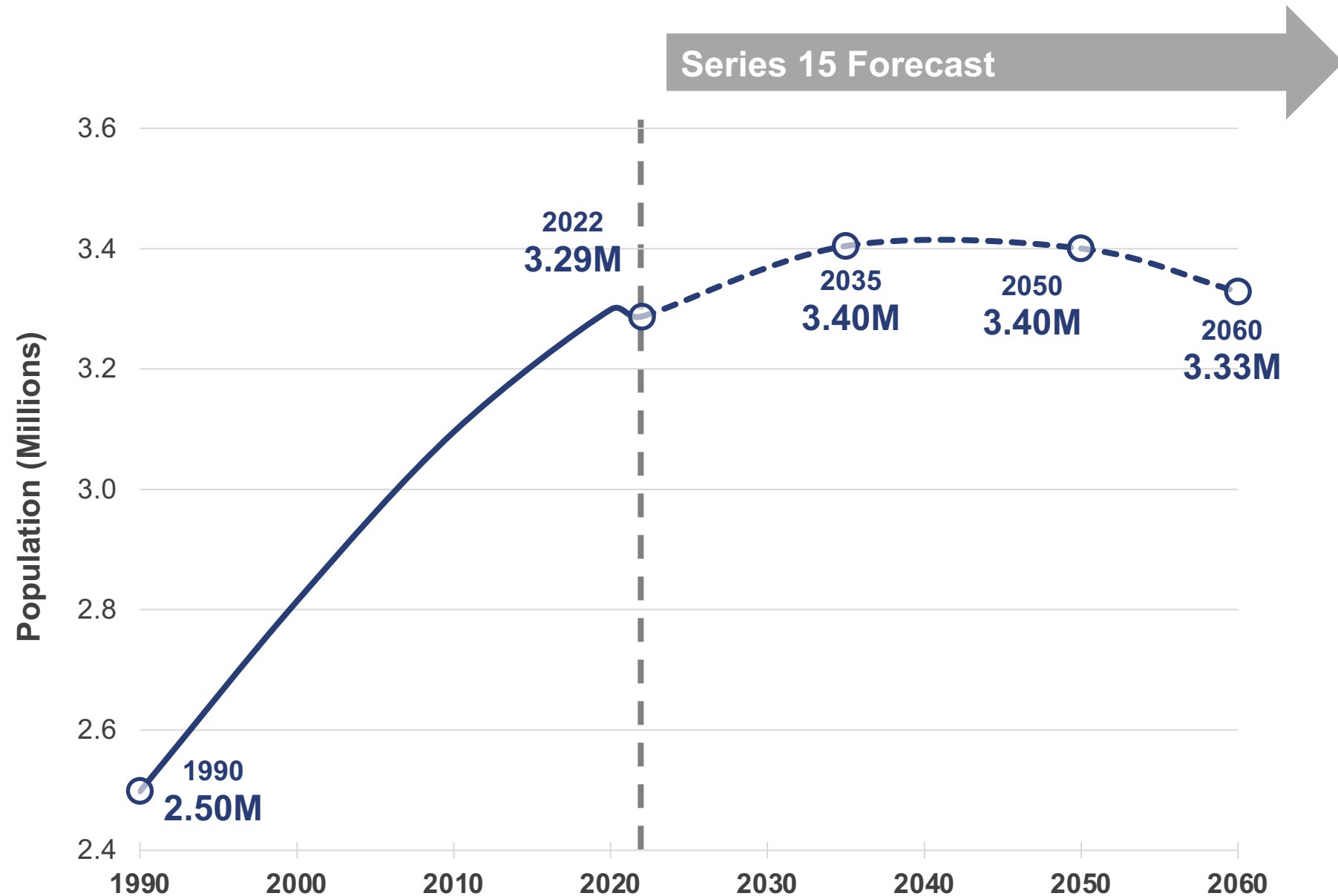
San Diego Regional Forecast

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Series 15 Forecast

Population (Millions)

1990
2.50M

2022
3.29M

2035
3.40M

2050
3.40M

2060
3.33M

Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060

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San Diego Regional Forecast Series 15

Births declining

Fertility rates
(*births per 1,000 women, Ages 15-44*)

1991: 82.7
2022: 55.8
2060: 51.3

Birth Rates
(*births per 1,000 population*)

1991: 23.2
2022: 11.1
2060: 9.6

**1991
50K**

**2022
37K**

Persons (Thousands)

San Diego Regional Forecast Series 15

Births declining
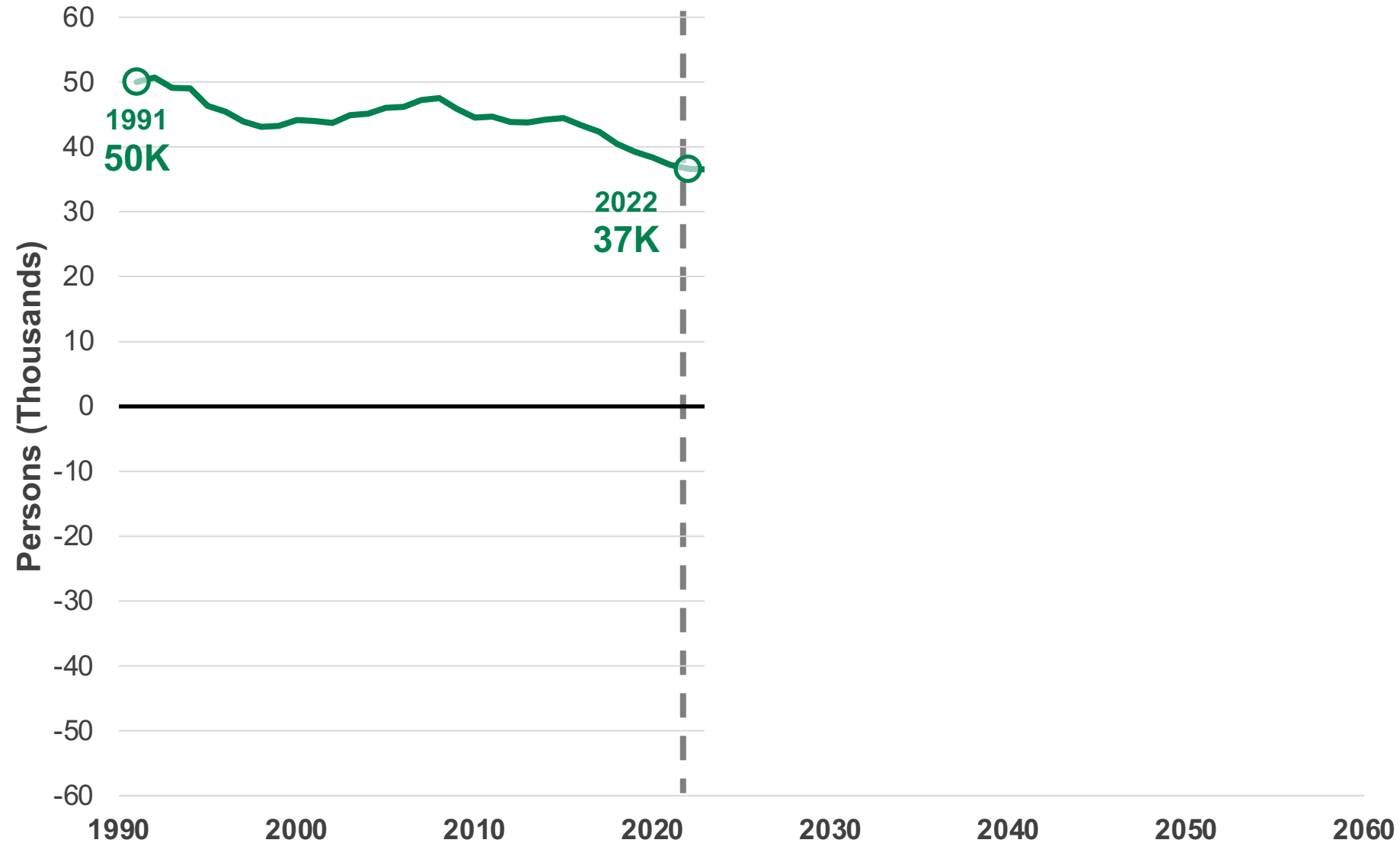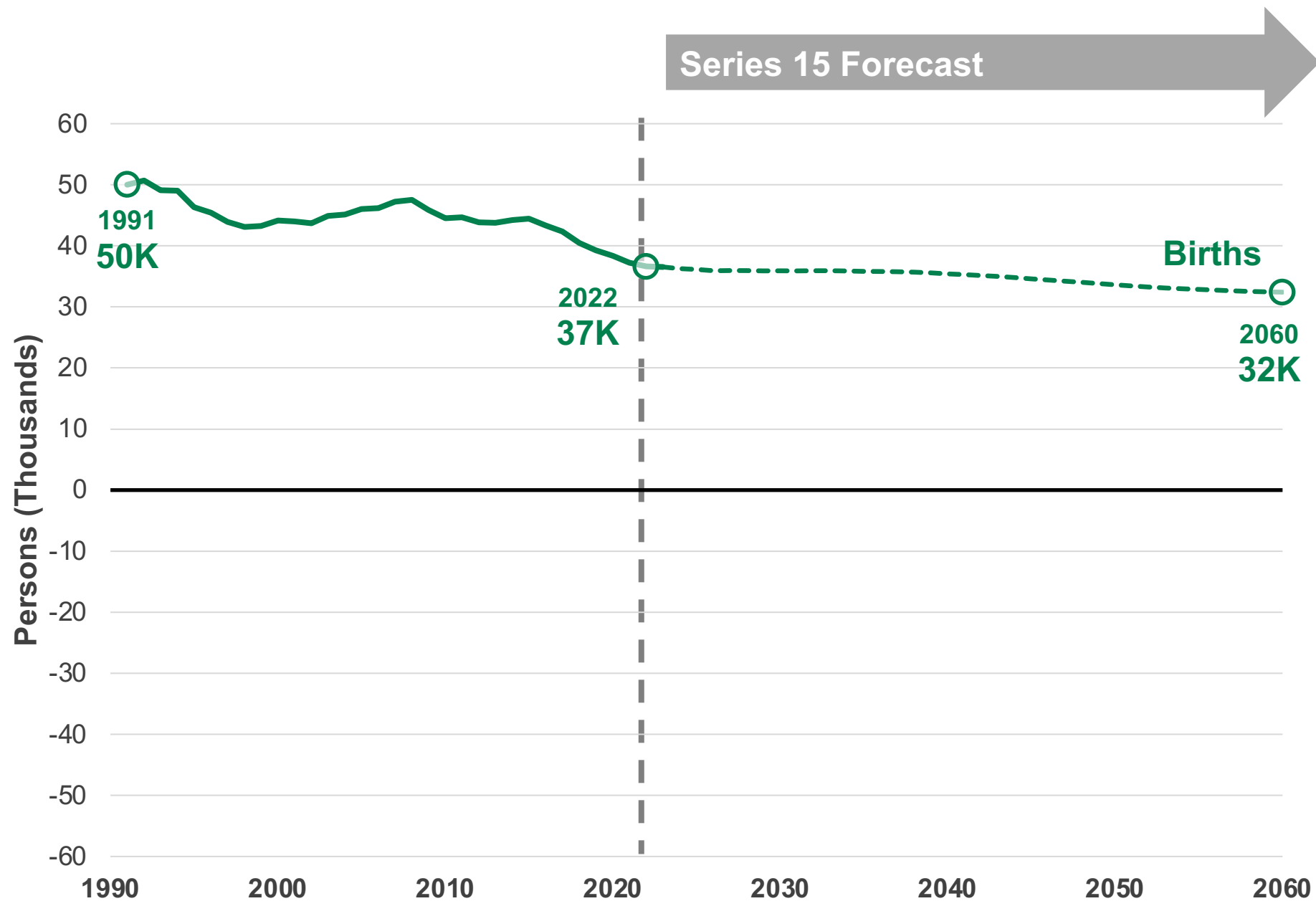
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Birth Rates
(*births per 1,000 population*)

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Series 15 Forecast

Persons (Thousands)

1991
50K

2022
37K

Births

2060
32K

San Diego Regional Forecast Series 15

Mortality rising

Mortality Rates
(*deaths per 1,000 population*)

1991: 7.9
2022: 7.6
2060: 12.0

Deaths related to substance-use disorder (drug overdoses and alcoholic liver disease) and self-harm have risen nationally since 2010.

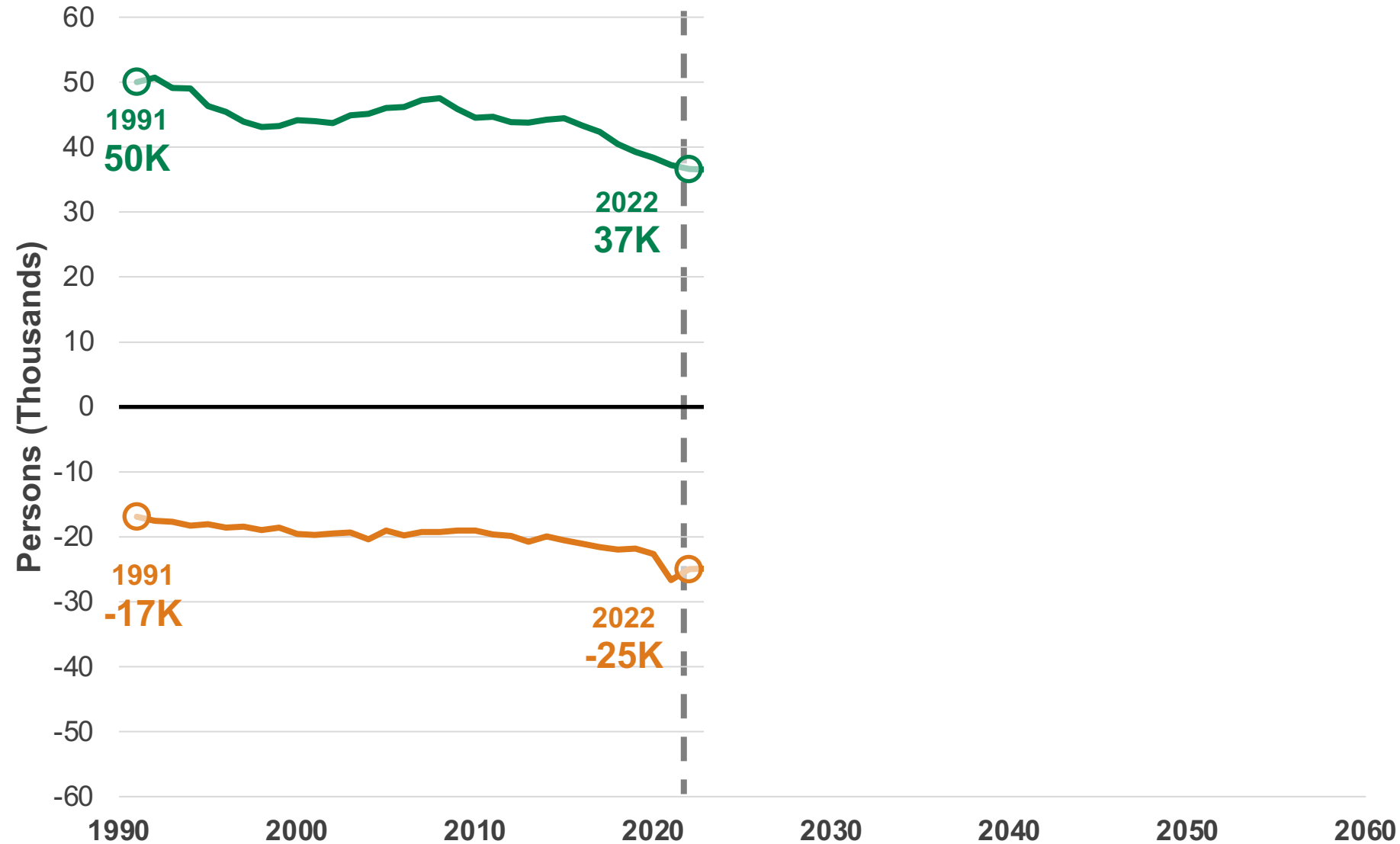Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060

San Diego Regional Forecast Series 15

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Persons (Thousands)

Births

1991
50K

2022
37K

2060
32K

1991
-17K

2022
-25K

Deaths

2060
-41K

Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060

San Diego Regional Forecast Series 15

Net migration breaks even

Decreasing births, increasing deaths, and fewer people moving into San Diego lead to a declining population

Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060

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San Diego Regional Forecast Series 15

Net migration breaks even

Decreasing births, increasing deaths, and fewer people moving into San Diego lead to a declining population

Series 15 Forecast

Persons (Thousands)

Births
1991 50K
2022 37K
2060 32K

Net Migration
1991 17K
2022 -18K
2060 0

Deaths
1991 -17K
2022 -25K
2060 -41K

Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060

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San Diego Employment

San Diego Regional Forecast - Employment

Growing Labor Force

More people work

Despite declining population, **labor force participation** increases

More Dynamic Economy

New in Series 15 Forecast

Measuring **total jobs**, including "gig" workers, captures diverse economy

Delaying Retirement

More people work longer

Longer lifespans, continuing income needs, and more opportunities **extend careers**

San Diego Regional Forecast Series 15

Employment

Despite population increasing just 41K (1.2%) between 2022 and 2060, jobs grow by 280K (13%) because of **higher labor force participation rates** (LFPR).

Ages 25-64
LFPR rises 74% to 79%

Ages 65 and Older
LFPR rises 18% to 23%

Total Jobs (Millions)

2001
1.71M

2022
2.14M

San Diego Regional Forecast Series 15
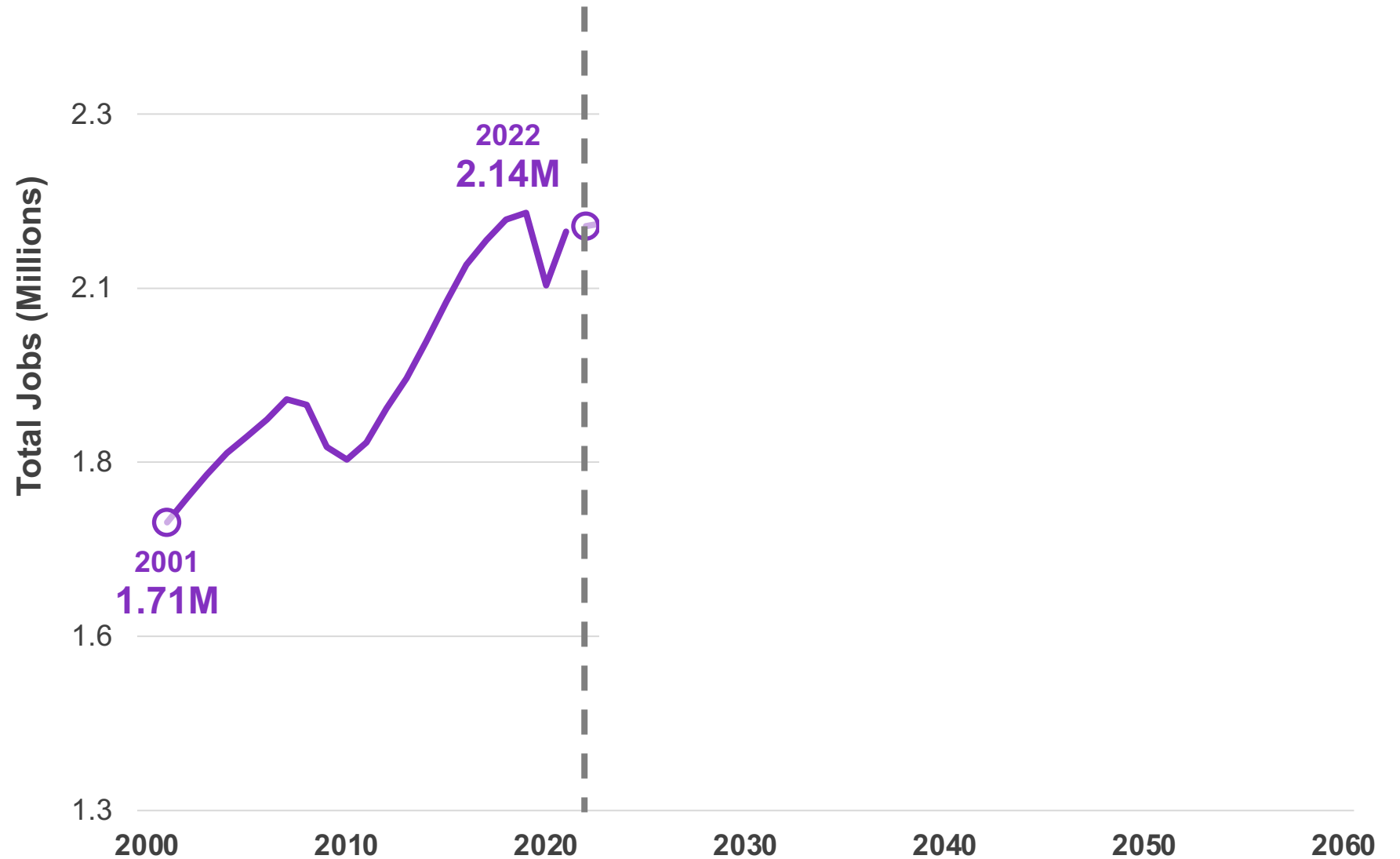
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LFPR rises 18% to 23%

Series 15 Forecast

Total Jobs (Millions)

2022
2.14M

Series 15

2050
2.37M

2060
2.42M

2001
1.71M

San Diego Regional Forecast Series 15

Employment

New in Series 15: Improved measure of San Diego jobs

Accounts for all jobs, including **non-wage/salary workers**, such as independent contractors, commission-only workers, and the "gig" economy

Series 15 Forecast

Total Jobs (Millions)

Bureau of Economic Analysis measures total jobs

Series 15

2060
2.42M

2050
2.37M

2022
2.14M

2001
1.71M

2022
1.51M

2001
1.22M

Bureau of Labor Statistics (Series 14 Forecast) measures only wage/salary jobs
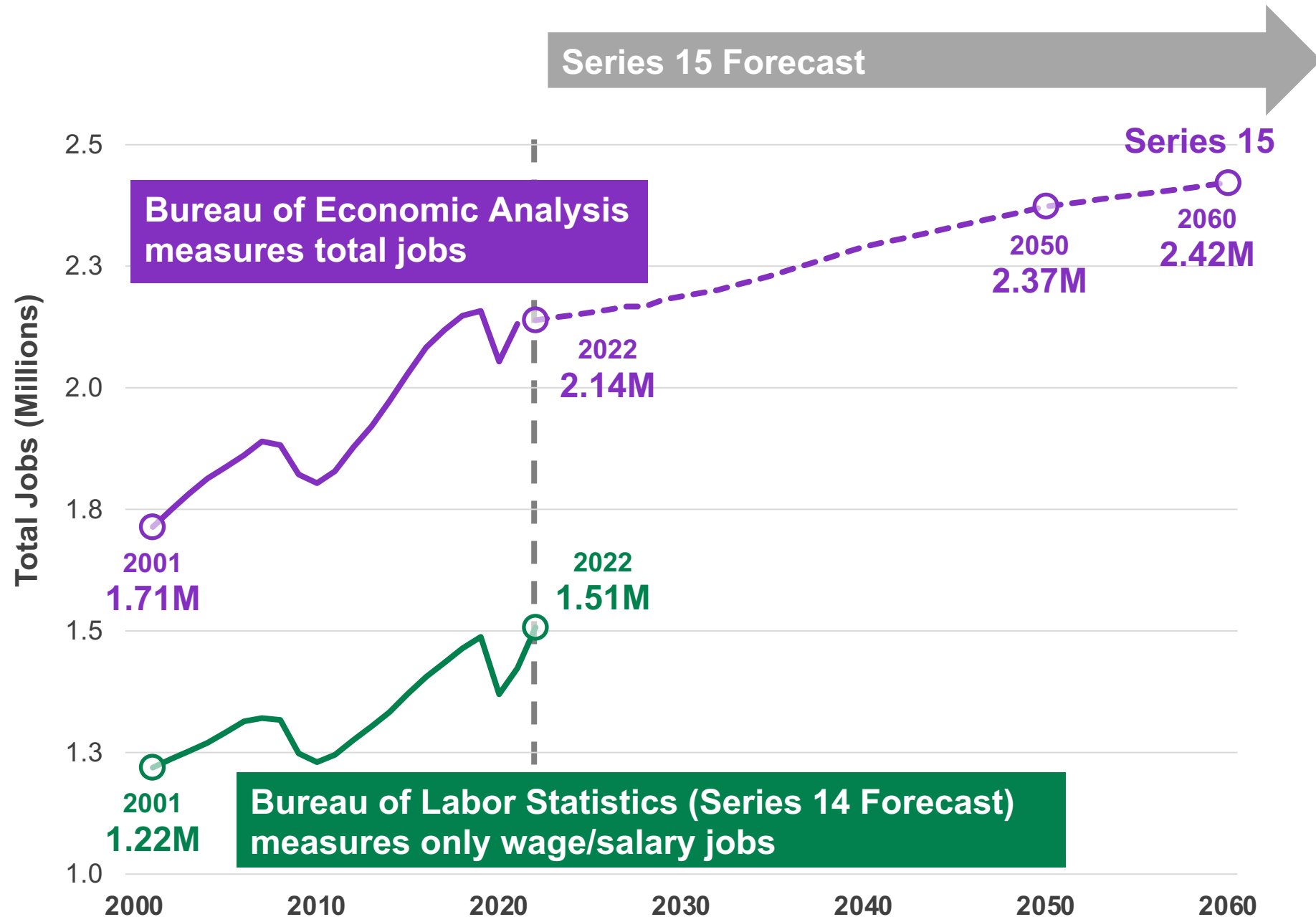
Source: Bureau of Economic Analysis; Bureau of Labor Statistics; SANDAG San Diego Regional Forecast, Series 15, 2022-2060

Proportion of Wage/Salary and Non-Wage/Salary by Industry
Key sectors employ many non-wage/salary workers (2021)

Non-wage/salary jobs accounted for 630K of 2.14M jobs (29%) in 2021

Industry	Total Jobs	Non-Wage/Salary %
Real estate	Total Jobs 115,532	75%
Professional, scientific, and technical	232,087	36%
Other services	115,935	61%
Finance and insurance	106,550	57%
Transportation	83,983	62%
Administration	132,174	33%
Arts and entertainment	47,031	52%
Education	46,095	46%

■ Non-Wage/Salary Jobs ■ Wage/Salary Jobs

Note: Only the top eight civilian sectors employing the highest percentage of non-wage/salary workers are shown
Source: Bureau of Economic Analysis (2021), Bureau of Labor Statistics (Quarterly Census of Employment and Workers, 2021)

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San Diego Regional Forecast - Employment
Professional, Innovation, and Healthcare will drive the economy

San Diego's $268 billion economy grows to $497 billion by 2060

Driving Sectors
Professional (20% of total jobs), Innovation (18%), Healthcare (14%), Tourism (10%), and Military (7%)

Professional (Real Estate, Finance and Insurance, Business) and **Innovation** (Life Sciences and Biotech) support higher income and longer careers. **Healthcare** overtakes **Retail** to meet the needs of an aging population.

Jobs by Sector (2060)
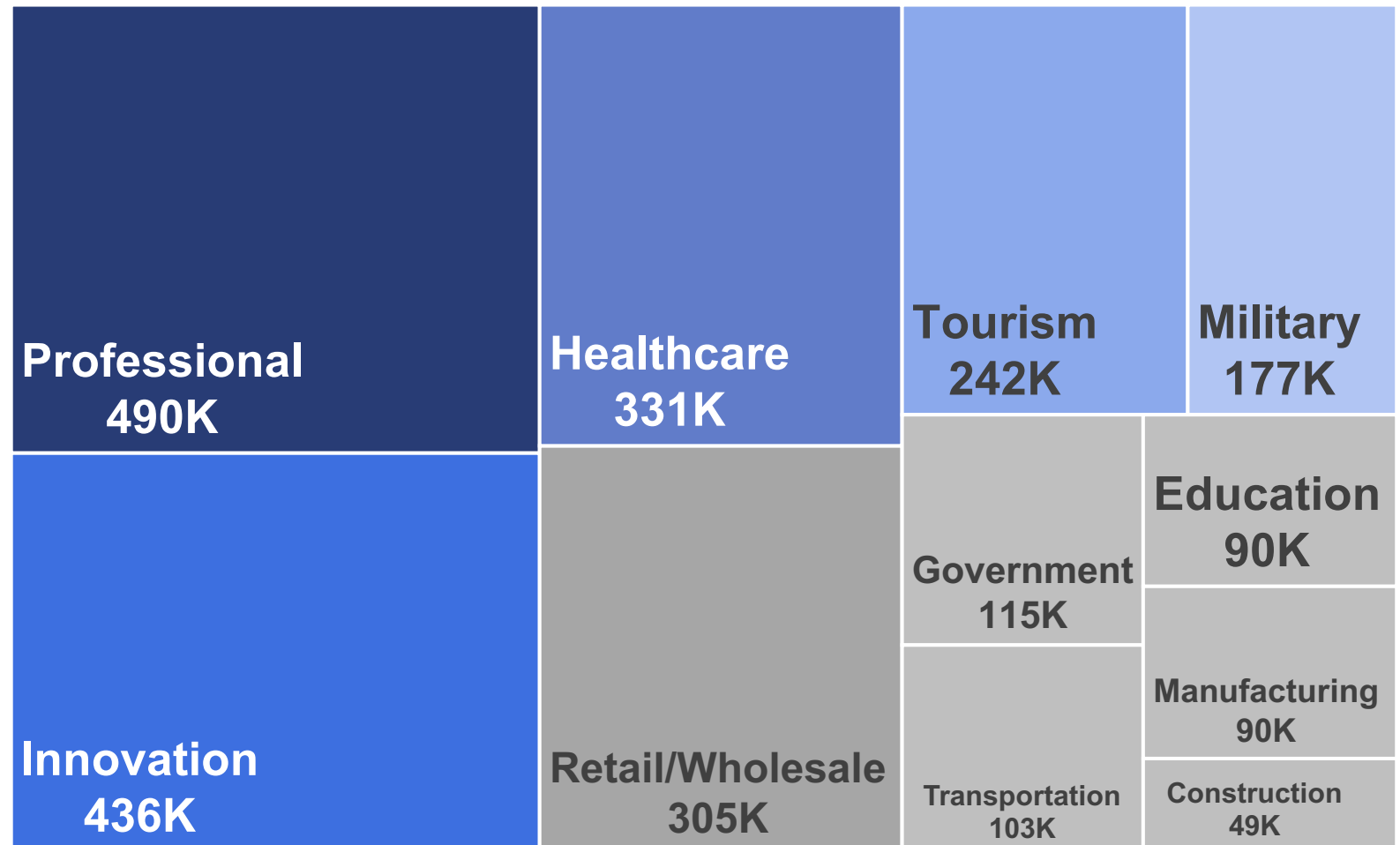
Professional 490K

Healthcare 331K

Tourism 242K

Military 177K

Innovation 436K

Retail/Wholesale 305K

Government 115K

Education 90K

Transportation 103K

Manufacturing 90K

Construction 49K

San Diego Regional Forecast - Employment
Innovation and Healthcare lead job growth

27% increase in sector from 2022

Sector	Growth %
Innovation	27%
Healthcare	25%
Professional	7%
Tourism	15%
Manufacturing	40%
Transportation	20%
Military	10%
Government	5%
Education	5%
Construction	6%
Retail	-4%

Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060

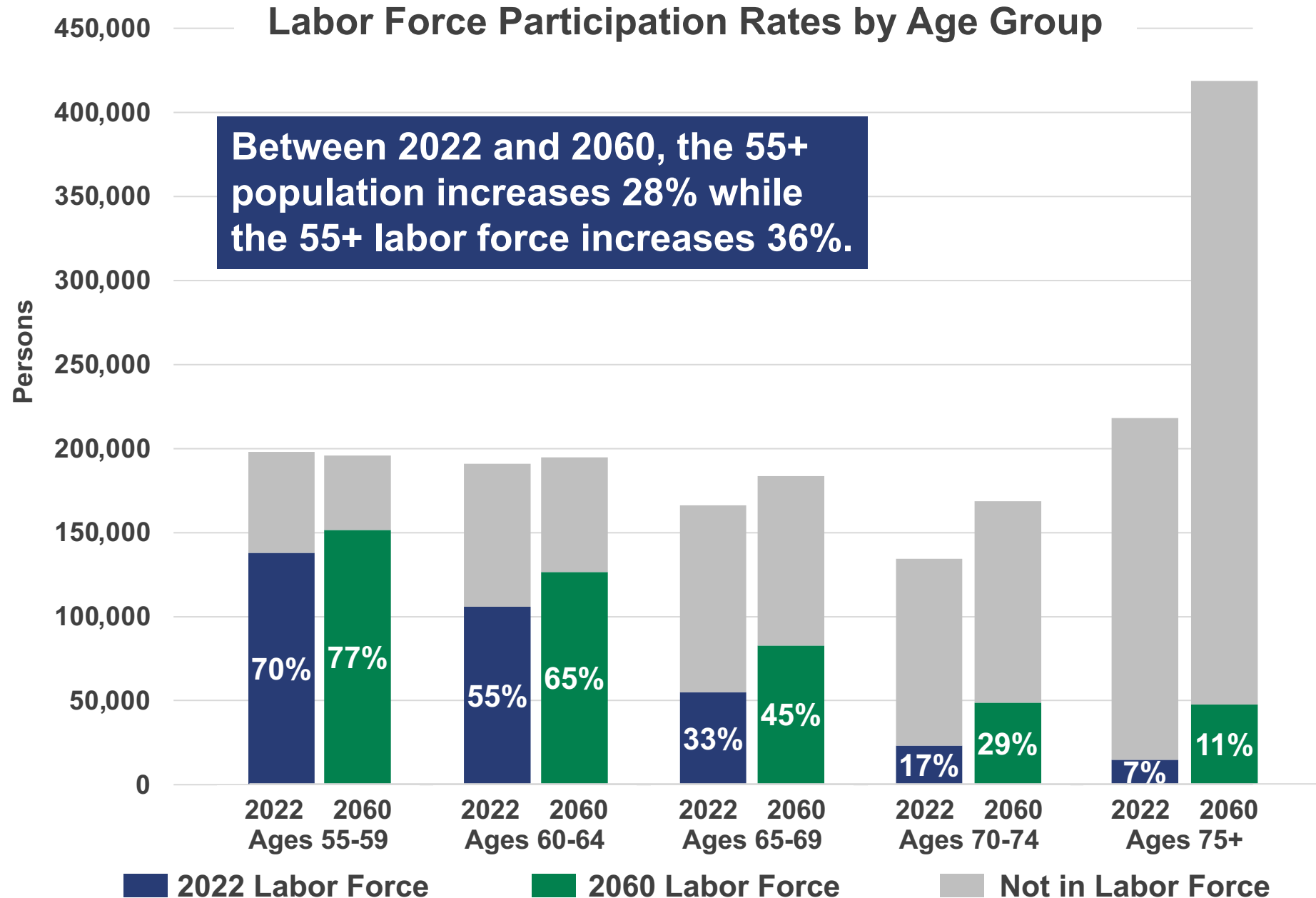SANDAG | 25
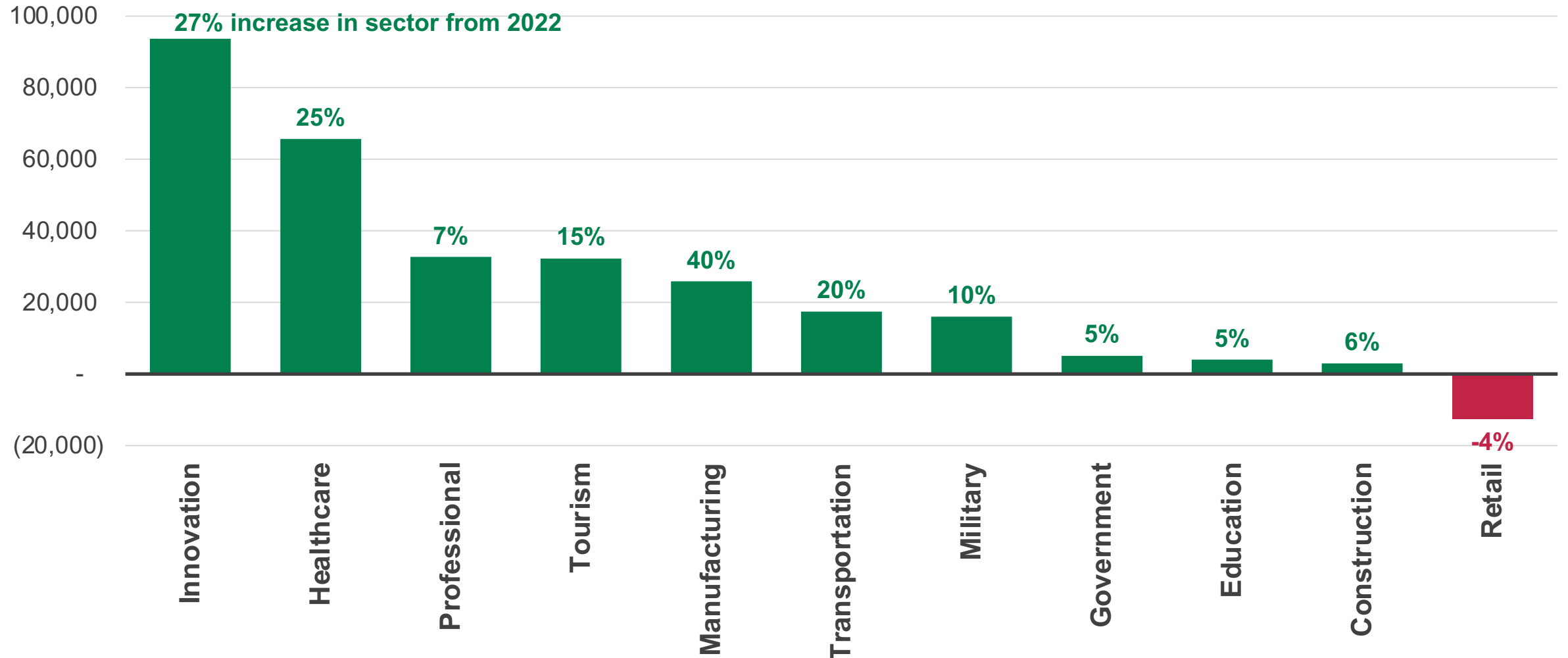
San Diego Regional Forecast Series 15

Age 55+ Labor Force

Reasons for working

- Limited retirement savings
- Pension, social security incentives for delaying retirement
- Seeking activity, purpose

Evolving social norms

- Less age discrimination
- Improved longevity
- More opportunities in knowledge-based sectors and for contract work/self-employment

Labor Force Participation Rates by Age Group

Between 2022 and 2060, the 55+ population increases 28% while the 55+ labor force increases 36%.

Persons

70%	77%	2022 / 2060 Ages 55-59
55%	65%	2022 / 2060 Ages 60-64
33%	45%	2022 / 2060 Ages 65-69
17%	29%	2022 / 2060 Ages 70-74
7%	11%	2022 / 2060 Ages 75+

■ 2022 Labor Force ■ 2060 Labor Force ■ Not in Labor Force

Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060

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San Diego Households

San Diego Regional Forecast - Households

Household Formation

Households increase through 2048 and change with the aging and more diverse population

Household Composition

Changes in household size and living arrangements show cultural patterns associated with aging

Senior Living

Older San Diegans age in place and more are choosing to live alone or move in with their children
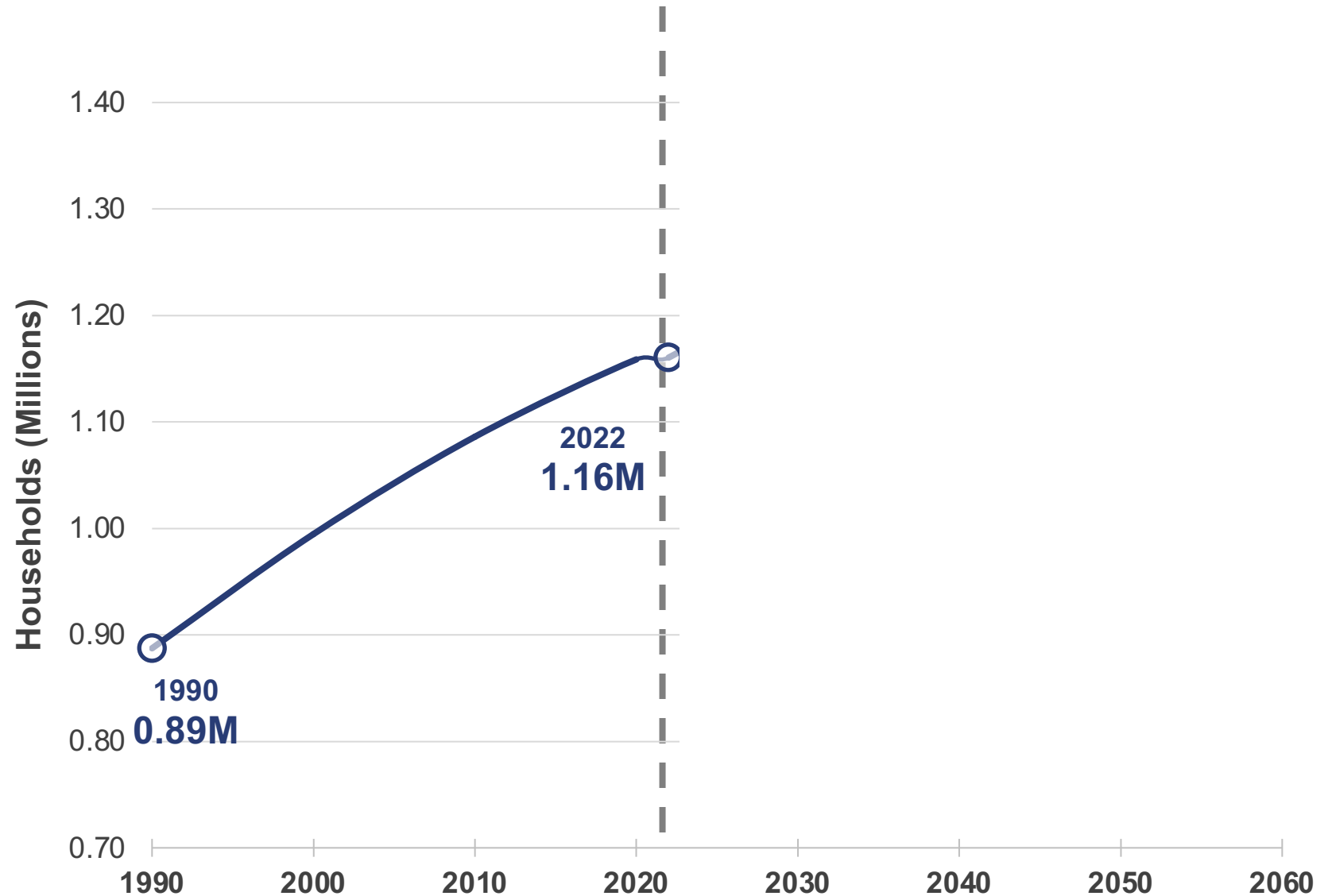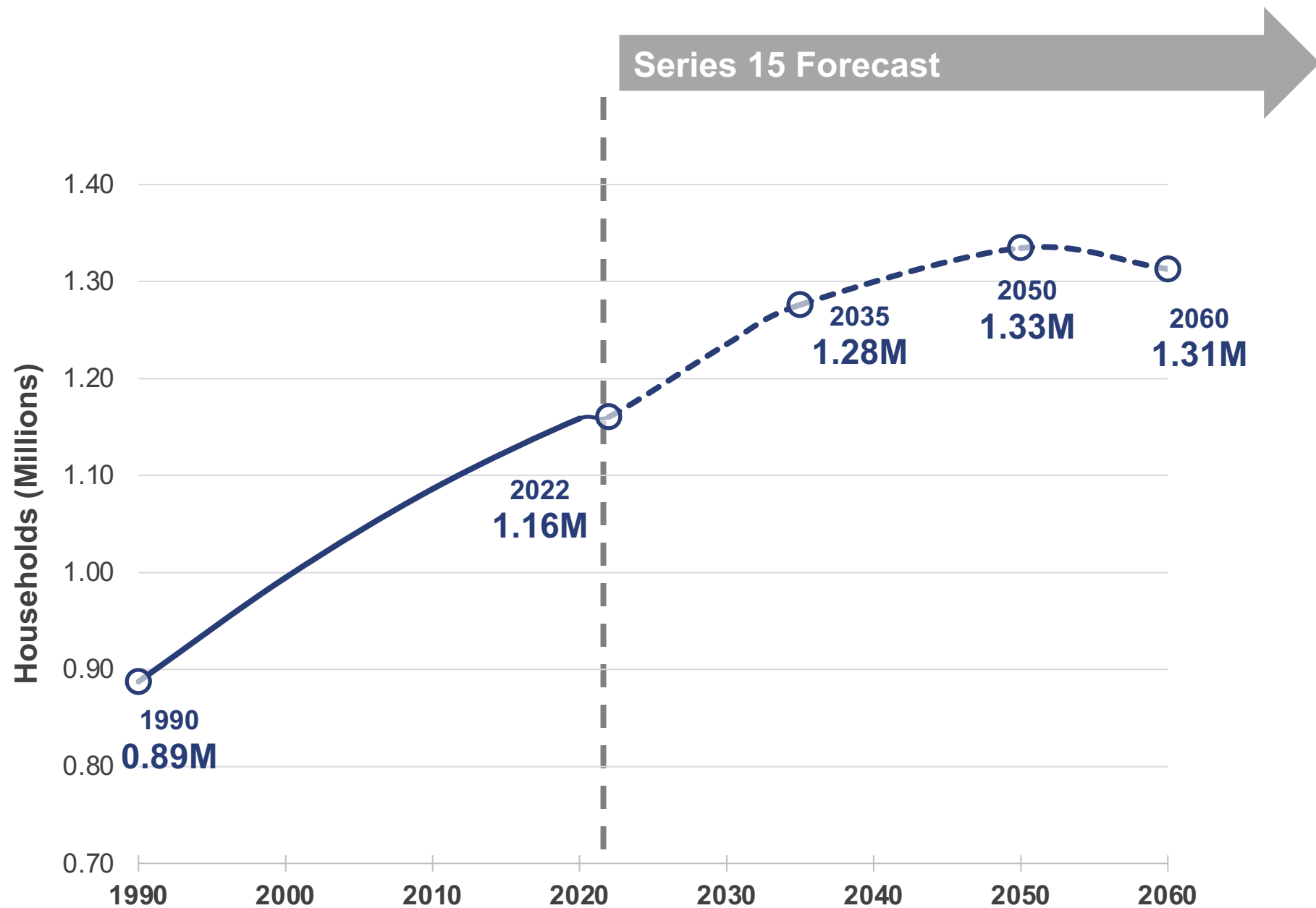
San Diego Regional Forecast Series 15

Households

Household formation growth (12%) outpaces population growth through 2060.

Households peak at 1.34M in 2048, then decline

Average household size:
2023: 2.79 persons
2060: 2.53 persons

Households (Millions)

1990
0.89M

2022
1.16M

Household Characteristics 2011-2021
Households with persons age 60+, seniors living alone are trending upward

7%

1.06M **1.14M**

-1%

0.37M **0.37M**

31%

0.33M **0.43M**

22%

0.08M **0.10M**

Total Households

Households with Persons Under Age 18

Households with Persons Age 60 and Older

Households with Person 65 or Older Living Alone

■ **2011** ■ **2021**
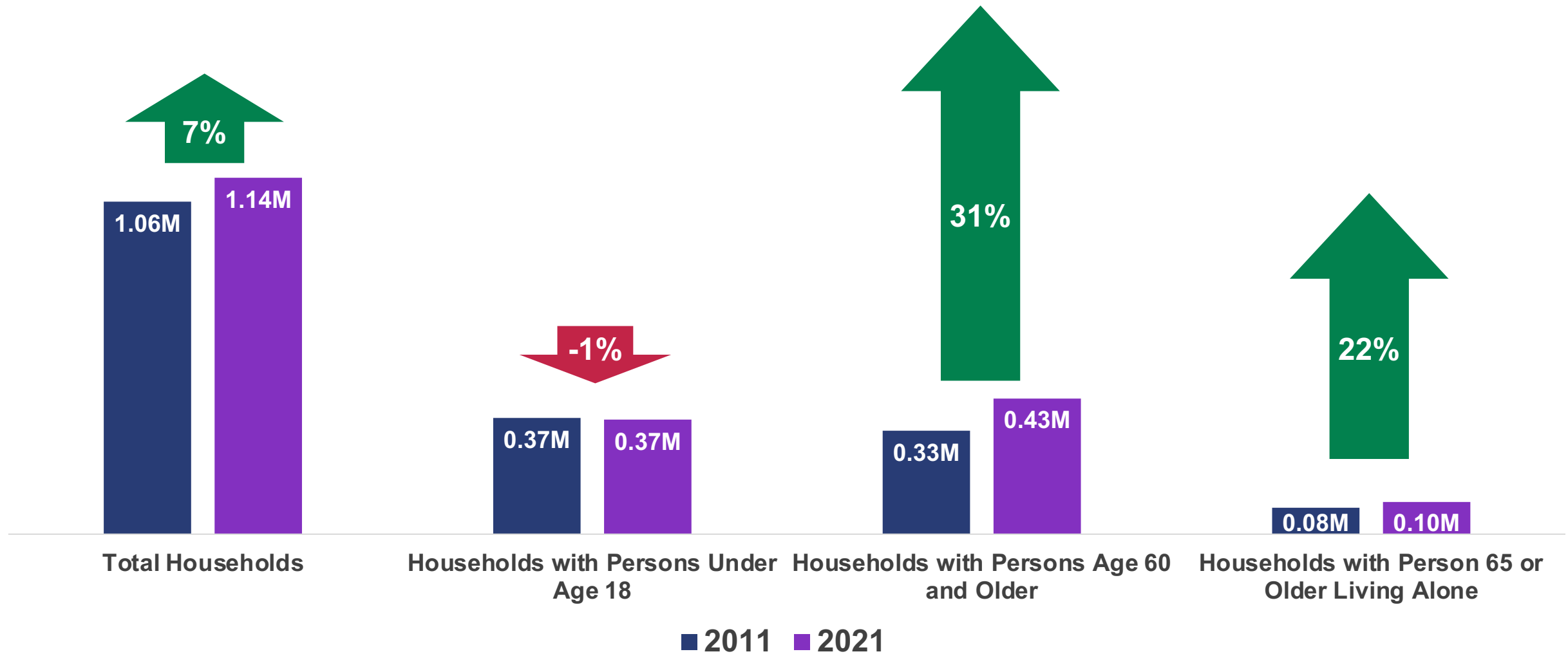
San Diego Regional Forecast Series 15

Households

Average Household Size		
Race/Ethnicity	2023	2060
White	2.30	2.12
Hispanic	3.56	2.88
Black	2.58	2.41
Asian	3.04	2.91
Multi-Race	3.53	3.11
Other	2.97	2.61

2023

Households

| White 52% | Hispanic 27% | Black 5% | Asian 12% | Multi-Race 4% | Other 1% |

Population

| White 43% | Hispanic 34% | Black 4% | Asian 13% | Multi-Race 5% | Other 1% |

2060

Households

| White 45% | Hispanic 30% | Black 4% | Asian 16% | Multi-Race 5% | Other 1% |

Population

| White 37% | Hispanic 34% | Black 4% | Asian 18% | Multi-Race 6% | Other 1% |

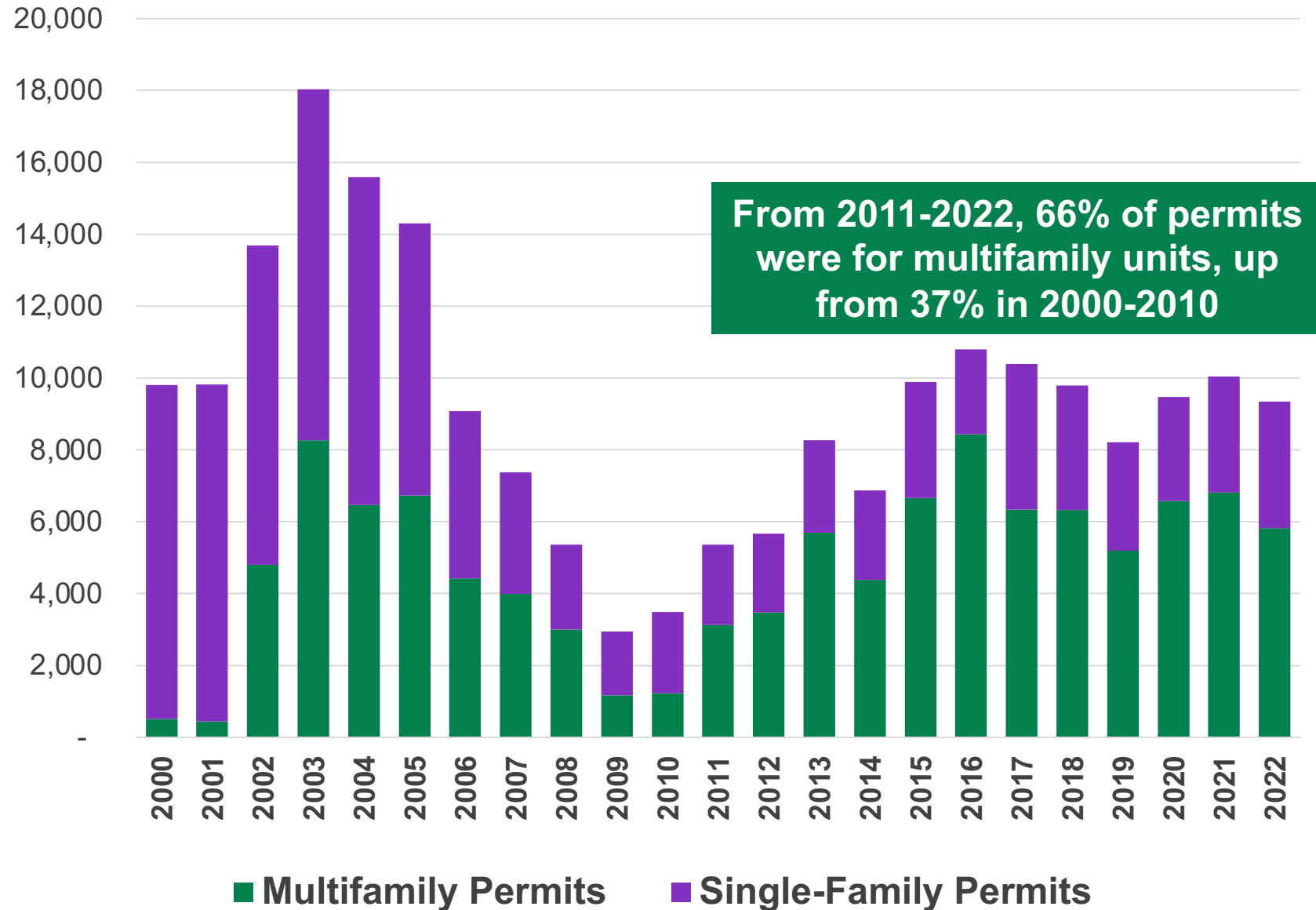**Legend:** White · Hispanic · Black · Asian · Multi-Race · Other
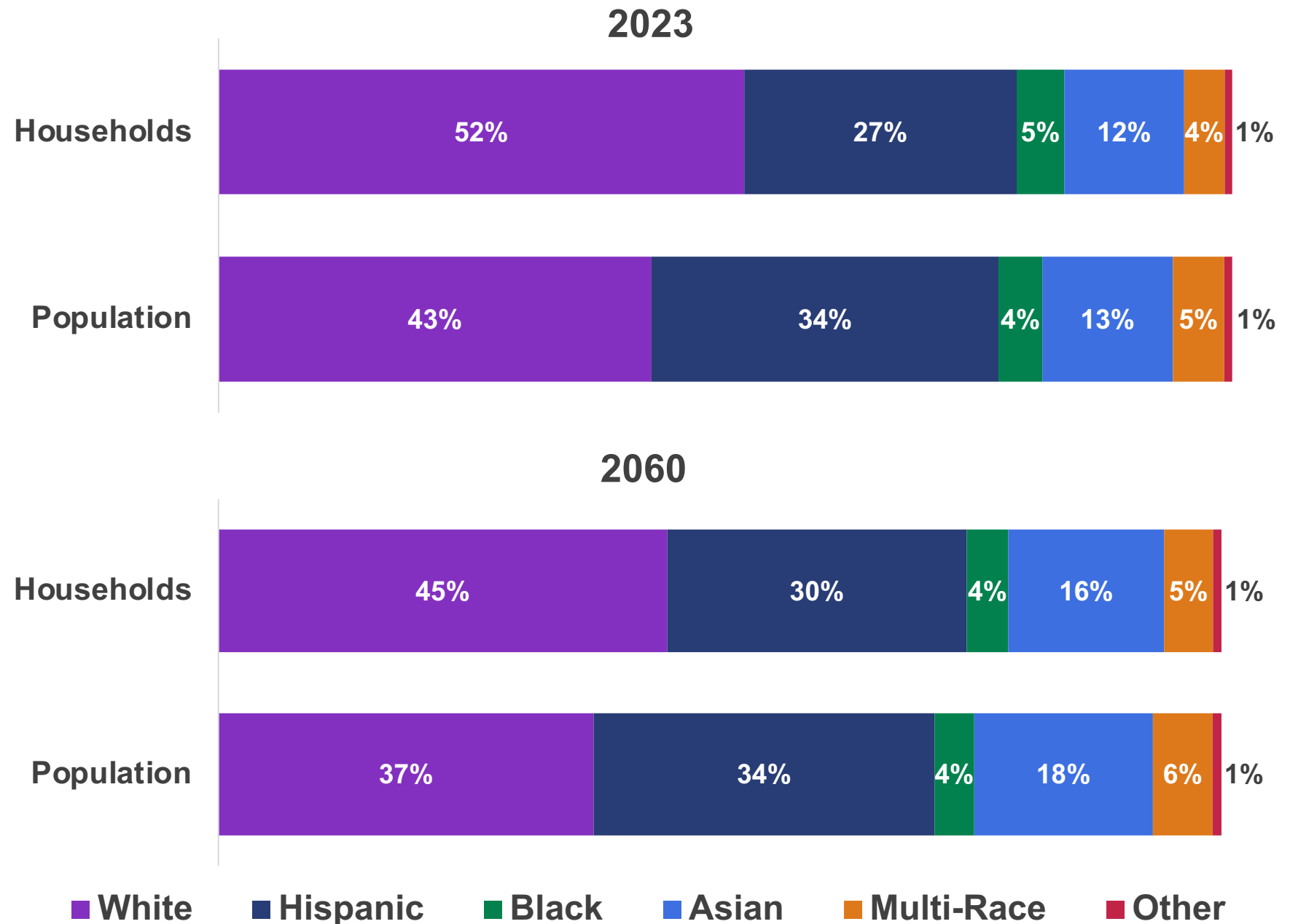
San Diego Region
Housing Permits 2000-2022

As the population and household composition changes, the housing mix will also adjust.

Multifamily housing has been on the rise, given the housing shortage and land-use constraints.
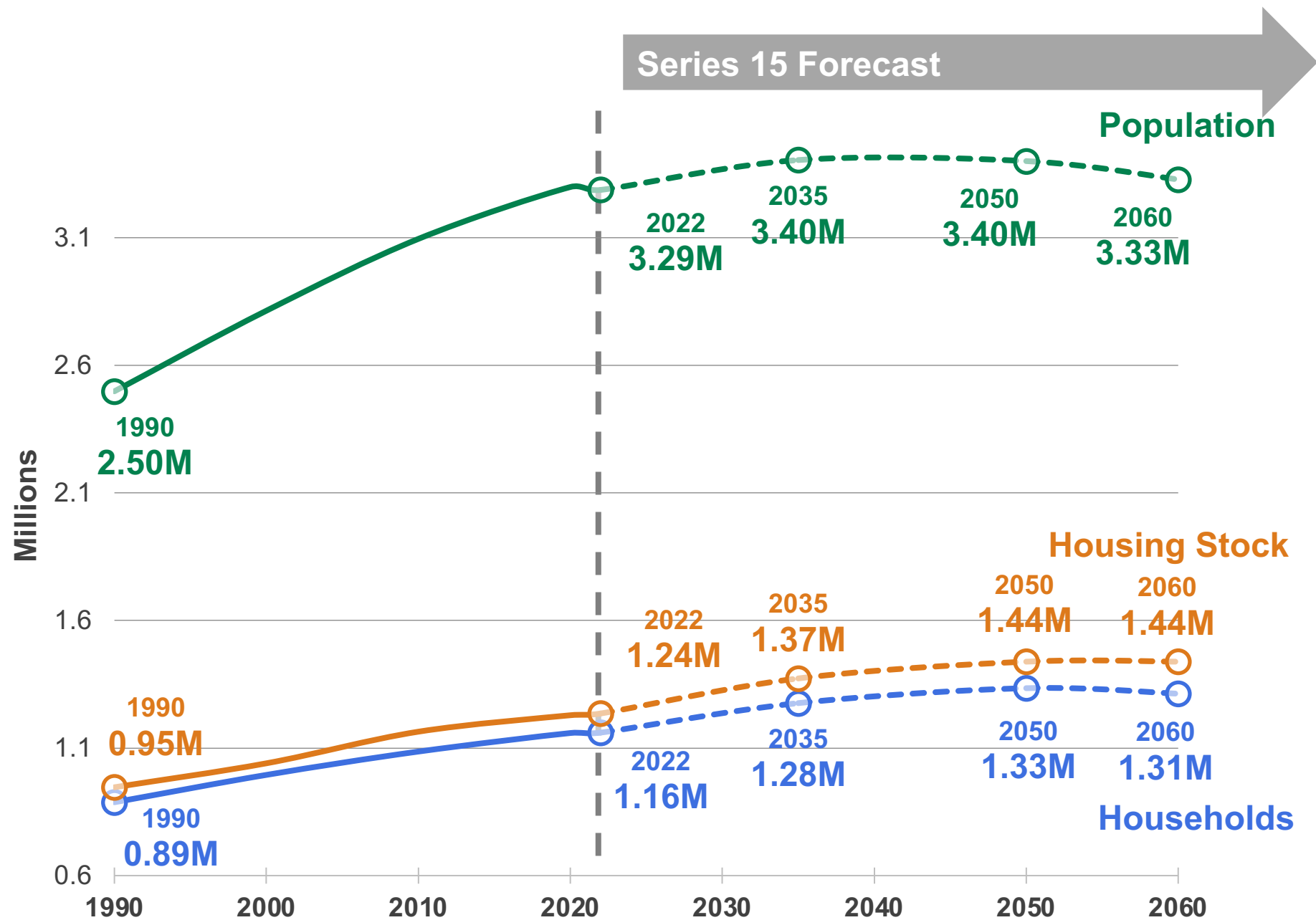
Housing Permits by Type (2000-2022)

From 2011-2022, 66% of permits were for multifamily units, up from 37% in 2000-2010

■ Multifamily Permits ■ Single-Family Permits

San Diego Regional Forecast Series 15

Housing

Housing stock is projected to rise at a similar pace to households through 2060

Series 15 Forecast

Population
- 1990: 2.50M
- 2022: 3.29M
- 2035: 3.40M
- 2050: 3.40M
- 2060: 3.33M

Housing Stock
- 1990: 0.95M
- 2022: 1.24M
- 2035: 1.37M
- 2050: 1.44M
- 2060: 1.44M

Households
- 1990: 0.89M
- 2022: 1.16M
- 2035: 1.28M
- 2050: 1.33M
- 2060: 1.31M

Millions

Source: SANDAG San Diego Regional Forecast, Series 15, 2022-2060

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San Diego Regional Forecast Series 15 Summary

Population

Very slow growth is projected before 2042, when population declines. Population continues to age and become more diverse.

Employment

Job growth continues as people work longer careers. Professional, Innovation, and Healthcare sectors drive strong, diversified economy.

Households

New households and changing living arrangements call for greater variety in housing mix.

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