ATTACHMENT B – Transit Opportunity Area Assessment Report

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DATE May 21, 2026

SUBJECT **TRANSIT OPPORTUNITY AREA (TOA) ASSESSMENT – HOUSING OPPORTUNITY AREA REPORT**

The attached report provides the results of the County's technical assessment of Transit Opportunity Areas (TOAs). The analysis was initiated in response to County of San Diego (County) Board of Supervisors (Board) direction to find solutions for VMT mitigation within key infill areas. At the time of Board direction, VMT was a major barrier to housing. However, since that direction, case law affirmed the County's ability to streamline General Plan consistent projects by relying on the California Environmental Quality Act (CEQA) Section 15183 exemption, despite the General Plan Environmental Impact Report's reliance on Level of Service instead of VMT. This update has shifted the need for a TOA specific mitigation program. As a result, the enclosed analysis should be viewed as a pilot study of opportunities for land use changes and how those changes could affect VMT efficiency.

The assessment was completed in two phases and reflects a comprehensive, data driven approach. The work identifies parcels with potential capacity for additional housing, examines market readiness for different residential product types, reviews land use suitability based on physical policy factors, and evaluates projected VMT outcomes using the most recent SANDAG Regional Travel Demand Model. The analysis does not recommend policy actions or zoning changes. Its purpose is to provide transparent baseline information and to support future planning discussions.

The assessment also highlights variations across communities. Some locations demonstrate stronger alignment between land use conditions, infrastructure characteristics, and market feasibility. Other areas exhibit physical, environmental, or infrastructure constraints that may limit the effectiveness of higher-density development or VMT mitigation strategies. These distinctions underscore the importance of geographically tailored approaches as the County continues to explore pathways to support housing production and sustainability goals.

The report is provided for informational purposes and to support ongoing discussions related to housing, mobility, and land use planning. Land use changes are not proposed at this time. Staff will continue to evaluate options and return to the Board with recommendations through the Framework and other upcoming planning processes.

ATTACHMENT
Exhibit A – Transit Opportunity Area Assessment

Transit Opportunity Area Assessment

Housing Opportunity Areas

FINAL

May 18, 2026

COUNTY OF SAN DIEGO
PLANNING & DEVELOPMENT SERVICES

Prepared for Planning & Development Services by:

MIG

County of San Diego
Planning & Development Services Department

Transit Opportunity Areas Assessment[1]

Housing Opportunity Areas

MAY 18, 2026

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[1] This project is titled "Transit Opportunity Area Assessment." However, the area criteria expanded to the broader category of "Housing Opportunity Areas" during the project timeline.

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I. DEFINITIONS[2]

Active Transportation – The movement of people or goods through non-motorized means. It is based around human physical activity and often requires pedestrian or bicycle infrastructure such as sidewalks and bicycle lanes.

California Environmental Quality Act (CEQA)– California law in Public Resources Code Section 21000 et seq. and California Code of Regulation, Title 24, Division 6, Chapter 3, Section 15000 et seq. (CEQA Guidelines) that requires state and local government agencies to inform decision makers and the public about the potential environmental impacts of proposed projects, and to reduce those environmental impacts to the extent feasible.

Infill – Defined by the California Governor's Office of Land Use and Climate Innovation[3] as "…building within unused and underutilized lands within existing development patterns, typically but not exclusively within urban areas." Multiple land use and transportation network variables were identified to create a quantitative definition for "infill development" in the County, including household density, intersection density, and job accessibility.

Level of Service – A metric used to analyze roadways and intersections by categorizing traffic flow and assigning quality levels of traffic based on delay or density.

Mobility Hub – As identified by the San Diego Association of Governments (SANDAG), locations where people can connect to many types of transportation such as public transit, bike lanes, and shuttles.

Housing Opportunity Areas – Areas with potential for increased housing densities that could potentially result in no or minimal Vehicle Miles Traveled (VMT)-related impacts. The Housing Opportunity Areas comprise Transit Opportunity Areas (TOAs), infill areas, SANDAG Smart Growth Opportunity Areas, and some County Village areas, as identified in the County's General Plan.

Transit Opportunity Areas (TOA) – Areas in which the regional transit network has the best opportunity to be expanded within the unincorporated county and are near or adjacent to SANDAG-identified "Mobility Hubs."

Transportation Study Guide (TSG) – A County of San Diego document that provides criteria regarding how projects should be evaluated for consistency with the County's transportation goals, policies and plans, and through procedures established under CEQA. The TSG establishes the contents and procedures for preparing a Transportation Study in the County of San Diego. TSG aids in determining appropriate mitigation under CEQA, as well as site-specific improvements to the transportation system to accommodate project traffic.

Vehicle Miles Traveled (VMT) – The number of miles traveled by motor vehicles on roadways in a given area over a given period of time.

Village Areas – Locations identified in the County of San Diego General Plan as areas where a higher intensity and a wide range of land uses are established or have been planned. Typically, Village Areas function as the center of community planning areas and contain the highest population and development densities, and are located within walking distance of commercial services, employment centers, civic uses,

[2] Most definitions are sourced from the County of San Diego Transportation Study Guide (2022).
[3] This office was retitled Office of Land Use and Climate Innovation (LCI or Cal LCI), in 2024.

and transit (when feasible).

VMT Mitigation Program – A framework that allows developers whose projects are identified to have a VMT-related impact to provide mitigation through a payment of fees, which ultimately fund VMT reducing infrastructure and/or programs. Programmatic VMT mitigation is generally a more effective approach in reducing VMT, as it allows jurisdictions to implement multi-modal infrastructure as a full system, with limited gaps, in areas with higher densities where the infrastructure is most effective.

- **VMT Based Fee Program –** A program in which a development project is assessed, a fee based on the severity of its VMT-related impact. The fee generally is based on new development's fair-share cost to implement off-site VMT-reducing infrastructure to offset or reduce a new development's impact to less than significant (under CEQA-related criteria). The revenue collected from the fee program can then be used to implement the multi-modal infrastructure improvements outlined in the SANDAG's Regional Transportation Plan (RTP) or other Capital Improvement Plan (CIP) programs.

- **VMT Mitigation Banking –** A mitigation approach that allow developers to buy VMT reduction credits from the County or other jurisdictions within the region that are the result of previously constructed VMT-reducing infrastructure or planned infrastructure that will be constructed within the near future. This program would operate similarly to a biological mitigation banking program, or the Carbon Offset program. The fees collected from this program would then be used to construct additional VMT-reducing infrastructure in new locations or to close gaps within the existing multi-modal network, thus making the network more efficient.

- **VMT Exchange Program** – A program allowing developments with VMT-related impacts to work with the County, or other local jurisdictions, to fund and implement off-site VMT-reducing infrastructure and/or programs to off-set their VMT related impacts. This program allows new development within suburban and rural jurisdictions to invest in multi-modal/VMT-reducing infrastructure in more urban jurisdictions where higher reductions are possible and more efficient.

II. BACKGROUND

The adoption of Senate Bill (SB) 743 changed the way the State of California conducts required traffic analyses per the California Environmental Quality Act (CEQA) for public and private development projects. Previously, CEQA review for traffic impacts was based on level of service (LOS). Effective as of July 1, 2020, SB 743 requires a method of "vehicle miles traveled," or VMT, to analyze transportation impacts on the environment and to identify mitigation measures to reduce those impacts.

VMT reflects the amount of driving and lengths of trips. A lower VMT equates to a lower environmental impact; a higher VMT equates to a higher environmental impact. Low VMT may be achieved by locating housing development near a mass public transit stop (e.g., a trolley stop) or an active transportation infrastructure (e.g., a bike lane). High VMT can also be mitigated by developing new transit stops and infrastructure. The standards and criteria for transportation-related impacts are outlined below:

> *CEQA Guidelines Section 15064.3(b)(1): Vehicle miles traveled exceeding an applicable threshold of significance may indicate a significant impact. Generally, projects within one-half mile of either an existing major transit stop or a stop along an existing high quality transit corridor should be presumed to cause a less than significant transportation impact. Projects that decrease vehicle miles traveled in the project area compared to existing conditions should be presumed to have a less than significant transportation impact.*

On February 9, 2022, the County of San Diego Board of Supervisors directed County staff to revise the local Transportation Study Guide (TSG). The TSG outlines how to evaluate projects for environmental impact and how to determine appropriate mitigation under CEQA. Direction from the Board included the following:

- Establish a VMT threshold for the County of San Diego using the regional average (inclusive of incorporated cities).
- Identify "Infill Areas" and General Plan "Village Areas" within or near potential "Transit Opportunity Areas (TOAs)." Within these "Infill Areas" and "Village Areas," no CEQA review for VMT analysis or mitigation would be required. (CEQA review for other topic areas may still apply.)

The TSG was adopted on September 28, 2022, and revised again in January 2026.

All proposed housing development projects are assessed against an impact threshold. Per CEQA requirements, any project found to have "significant impact" is required to include mitigation measures to reduce that impact. Projects determined to have "less than significant impacts" do not require mitigation measures.

Generally, mitigation measures for VMT-related impacts can be accomplished with the creation of multi-model transportation infrastructure (such as bicycle, pedestrian, and mass transit facilities) to increase mobility options beyond personal vehicles. However, multi-model infrastructure can be challenging for the following reasons:

I. It is implemented by the developer for the project site, resulting in "spot treatment", rather than implemented as a comprehensive system. This yields gaps in service and ineffective infrastructure.

II. If implemented in areas of high-density land uses (e.g., urban areas), it is more effective in reducing VMT (higher ridership, more frequent use, etc.). If implemented in medium- or low-density land uses (e.g., suburban or rural areas), it is less effective in reducing VMT. Cost of implementation may be the same in different areas, but the output is very different.

III. Public transportation is often provided by third-party private entities. In the case of the County of San Diego, public transit is offered by the Metropolitan Transit System (MTS) and North County Transit District (NCTD). Therefore, construction of a new mass transit stop is not within the County of San Diego's responsibility.

For these reasons, programmatic (rather than capital) measures can be more successful when applied systemwide. A Countywide VMT Mitigation Program may include VMT Based Fee Programs or VMT Mitigation Banks. However, given the greater vehicle miles traveled for daily tasks in suburban areas as compared to urban areas, the cost per VMT would similarly be greater in suburban areas and less in urban areas. Based on the extent of suburban VMT, the costs may be prohibitively high and hinder new housing development.

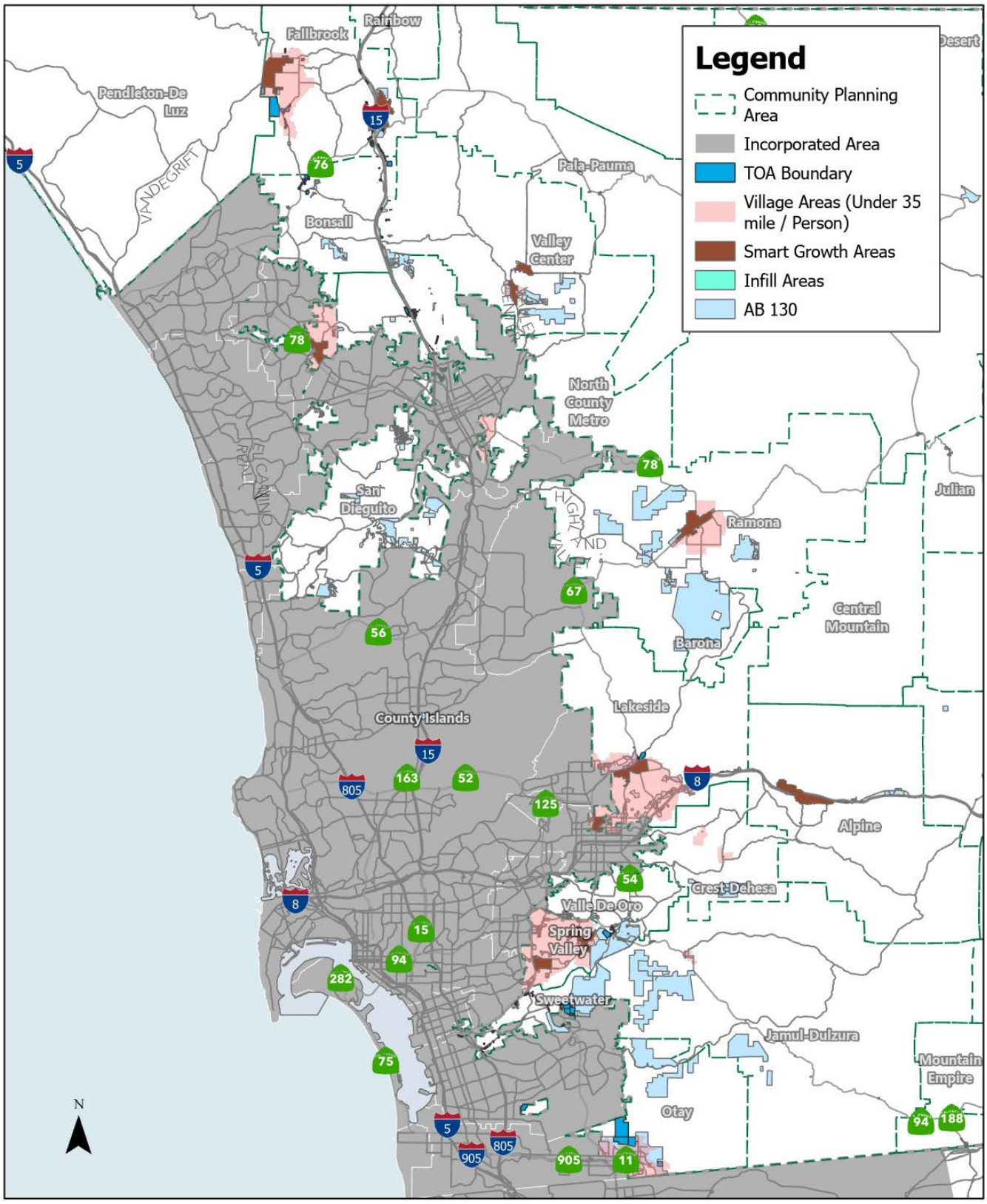
III. PROJECT INTRODUCTION

In late 2024, the County of San Diego hired a consultant team to conduct a study calculating expected fee costs for specific "Transit Opportunity Areas" to determine the likely impact of a Vehicle Miles Traveled (VMT) Based Fee Program, if applied Countywide. In phase 1, the study only looked at Transit Opportunity Areas (TOA); in phase 2, this was expanded to include Village Areas, Smart Growth Areas, Infill Areas, and Assembly Bill (AB) 130[4] parcels, altogether referred to as "Housing Opportunity Areas" (see Figure 1). The study involved reviewing parcels within these Housing Opportunity Areas to analyze housing development potential (market conditions, financial feasibility, and existing General Plan residential densities). Based on those analyses, a portion of parcels were identified as potentially suitable for increased residential density. Using those identified parcels, and their recommended upzoned densities, an analysis was conducted to determine VMT-related environmental impact and fee-based mitigation strategies.

The objective of the analysis was to present to the Board the theoretical impact of a VMT Mitigation Program on housing development in San Diego County's Housing Opportunity Areas. Calculated impacts[5] inform whether certain areas would be overly burdened with VMT Based Fees, thus likely disincentivizing any housing development in those locations. Results from this study are presented to the Board for their consideration of a VMT Mitigation Program as a regional strategy.

This project is separate from, but part of, a larger effort of housing initiatives being undertaken by the County of San Diego. Key initiatives include the County's Sustainable Land Use Framework (Framework), which builds on smart growth[6] principles, by taking a regional systems-based approach to planning. This approach helps identify where development and density should be focused to support efficient land use and mobility networks. Additional initiatives include the Development Feasibility Analysis (DFA) which focuses on strategies to reduce barriers to housing development, and the Housing Opportunity Areas/TOA which focuses on land use modifications and VMT mitigation fees to support housing density in prioritized areas.

[4] AB 130, signed by Governor Newsom on June 30, 2025, was designed to accelerate housing production by providing CEQA exemptions for qualifying urban infill projects, as defined in the legislation.
[5] The VMT Based Fee calculation was based on methods outlined in the CAPCOA handbook and the SANDAG Series 15 (ABM 3) Base Year 2022 model. Calculations are based on vehicular travel only; no pedestrian or cycling data was applied at this stage.
[6] Smart growth refers to focused development in compact areas close to jobs, services, and public facilities to maximize the use of existing infrastructure and preserve open space and natural resources. (County of San Diego, *Sustainable Land Use Framework*)



County of San Diego Sustainable Housing

Figure 1
Sustainable Housing Areas

IV. PROJECT PHASES AND GEOGRAPHIC AREAS

Table 1. Geographic Areas per Project Phase

	Areas	Included in Phase 1?	Included in Phase 2?
1	Alpine, Crest, Dehesa, and Jamul		Yes
2	Fallbrook	Yes	Yes
3	Julian		Yes
4	Lakeside	Yes	Yes
5	North County Metro North		Yes
6	North County Metro East	Yes	Yes
7	Otay	Yes	Yes
8	Ramona		Yes
9	Spring Valley		Yes
10	Sweetwater	Yes	
11	Valley Center		Yes
12	Valle de Oro	Yes	
13	County Island	Yes	

Note 1: The above area nomenclature is used for project purposes only. Area names are not official, and may not align with boundaries of other County projects.

Note 2: Phase 2 included market and financial analysis of only 8 areas. The other areas were previously analyzed in Phase 1.

V. ANALYSES

Four separate analyses were conducted to review the Transit Opportunity Areas (TOA), Housing, and relevant parcels:

1. TOA / Housing Opportunity Area Boundaries Determination
2. Market and Financial Feasibility Assessment
3. Land Use Analysis
4. VMT Assessment

TOA / Housing Opportunity Area Boundaries Determination

The project occurred in two phases. The **first phase** looked at areas based on an index,[7] which was applied to parcels within a one-half-mile buffer of future transit lines. The parcels were then ranked on a points system to determine which parcels meet the minimum criteria to be considered a TOA parcel candidate. The **second phase** expanded the original area based on Village Areas, Smart Growth Areas, Infill Areas, and AB130 parcels.

For more detailed information, see Appendix A.

Market and Financial Feasibility Assessment Summary

To further inform potential development feasibility in target areas, an assessment evaluating market support for increased housing density was conducted.[8] The analysis included a review of demographic characteristics such as median household income and population; projects currently under construction and in the pipeline; recent land sales for new development; proximity to transit and the prevalence of neighborhood amenities; median sales prices for detached/attached single-family homes; and average effective monthly rents for multi-family apartments. From these reviews, areas were evaluated across three timeframes: near-term (0 to 5 years), mid term (5 to 10 years), and long-term (10 to 20 years).

Building on the market study, a financial feasibility assessment evaluated the potential for residential development in the target areas. This assessment reviewed likely development costs linked to considerations such as infrastructure (water, sewer, and stormwater), construction and materials, incomes, employment types and availability, land costs, housing typologies, unit yield, and more. Based on findings, areas were evaluated as have “strong”, “moderate”, or “weak” feasibility to generate sufficient revenue for a developer’s positive yield.

The market and financial assessments contributed to proposed land use densities. For more detailed information, see Appendix B and Appendix C.

Land Use Analysis Summary

The Land Use Analysis was conducted using geospatial and policy data, knowledge of area-specific and neighborhood-specific characteristics, long-range planning goals, and best practices for built environment design. The approach reviewed parcels for the following attributes: [9]

- Sufficient zoning per the current General Plan designation

[7] Original TOA index and corresponding parcels were identified by Intersecting Metrics (IM).

[8] For the market and financial feasibility assessments, an infrastructure capacity check was not conducted. Reasonable assumptions were made regarding which areas or sub-areas rely primarily on private wells and/or septic systems but did not attempt to quantify or independently verify that the improvements exist.

[9] The analysis did not parallel the County’s Climate Action Plan (CAP) Equity Implementation Framework, however overlapping prioritization factors include safety and mobility in rural areas, economic development opportunities, daily stressors such as food access, and geography such as rural culture and place.

- Location (retail corridors, neighborhood edges, etc.)
- Parcel characteristics (size, building-to-land value, topography etc.)
- Land use adjacencies
- Environment and access
- Area characteristics (neighborhood feel, community character, etc.)

Based on phase 1 and phase 2 of the study, 297 parcels were identified. Proposed increased densities on the selected parcels would result in a potential yield of 11,329 housing units. All proposed unit increases are assumed via land use or zoning modifications. Parcels that had a General Plan Land Use of "Specific Plan" were not included in the recommended list.

For more detailed information, see Appendix D.

VMT Assessment

Based on the parcels identified for increased density, a VMT assessment was conducted to determine the potential VMT-related impacts that could be associated with such density increase. The VMT analysis was conducted using the SANDAG Series 15 (ABM 3) Base Year 2022 model. Based on new dwelling unit increase and population increase, a total daily VMT impact for each parcel was determined. Table 2 summarizes the total daily VMT-related impact per Community Planning Area under this proposed density scheme.

For more detailed information, see Appendix E and Appendix F.

Table 2. VMT-Related Impact by Community Planning Area (CPA)

CPA	Total New Dwelling Units	Population Increase[1]	Daily VMT Related Impact (Miles)
Alpine	226	629	2,168
Bonsall	1,059	2,944	14,248
Fallbrook	3,649	10,144	23,145
Hidden Meadows	219	609	3,216
Lakeside	1,181	3,281	13,445
North County Metro	285	791	1,910
Ramona	1,615	4,492	9,046
Spring Valley	217	603	236
Sweetwater	38	106	77
Valle De Oro	210	584	0
Valley Center	2,630	7,309	53,377
Total	**11,329**	**31,492**	**120,870**

1. Population increase is the total number of dwelling units multiplied by the average number of people per household (2.78).

VI. VMT Mitigation Options

Based on the analyses and outcomes, the study presents the following options for consideration:

1. The County implements a **Countywide VMT Mitigation Program** (such as a VMT Based Fee Program or VMT Mitigation Bank/Exchange Program). However, looking at the discrepancy of fees per Community Planning Area (CPA) (Table 3), some areas will experience significantly higher impact fees than others. Costs in these areas may be prohibitively high and hinder housing development.

2. The County implements a **local VMT Mitigation Program** (such as a VMT Based Fee Program or VMT Mitigation Bank/Exchange Program) that focuses on developing VMT-reducing infrastructure in the Housing Opportunity Areas. A local and focused program would help ensure that multi-modal and other VMT-reducing infrastructure are implemented as new development within these areas occurs. However, the total calculated daily VMT (Table 2) of 120,870 miles in the Housing Opportunity Areas is unlikely to be fully mitigated with such infrastructure, leaving an excess of unaddressed VMT-related impacts. In this case, a local VMT Mitigation Program would require an Environmental Impact Report (EIR) to disclose the impacts and seek a statement of overriding considerations.

3. The County participates in the **San Diego Regional VMT Mitigation Program (Regional Program)** and the **State of California VMT Mitigation Bank Program (Statewide Program)**.
   - The cost of the Regional Program would be dynamic and dependent on the types and location of VMT-reducing infrastructure posted at any given time by the program. However, based on initial estimates, the anticipated cost to mitigate through the Regional Program would be between $2,700 and $4,500 per mile of VMT that needs to be reduced.
   - The cost of the Statewide Program, based on initial estimates, is anticipated to be $3,408 per mile of VMT that needs to be reduced.
   - Table 4 outlines the total mitigation costs based on the Regional Program and Statewide Program for San Diego County Housing Opportunity Areas.

Table 3. VMT Mitigation Cost by Community Planning Area (CPA) per Option 3

CPA	Statewide Program	Regional Program (Lower End)	Regional Program (Upper End)
Alpine	$7,389,703	$5,854,518	$9,757,530
Bonsall	$48,560,456	$38,472,192	$64,120,320
Fallbrook	$78,878,058	$62,491,419	$104,152,365
Hidden Meadows	$10,958,492	$8,681,904	$14,469,840
Lakeside	$45,820,935	$36,301,797	$60,502,995
North County Metro	$6,510,541	$5,157,999	$8,596,665
Ramona	$30,829,552	$24,424,821	$40,708,035
Spring Valley	$802,618	$635,877	$1,059,795
Sweetwater	$265,176	$210,087	$350,145
Valle De Oro	$0	$0	$0
Valley Center	$181,909,804	$144,118,683	$240,197,805
Total	**$275,745,294**	**$338,414,679**	**$564,024,465**

Note: It is assumed that if the County moved forward with a local VMT Mitigation Program it would be similar in cost to the upper end of the Regional Program.

VII. ADDITIONAL RECOMMENDATIONS

Additional recommendations for next steps include:

1. **Update the General Plan Land Use and Mobility Elements** to plan for increased densities in smart growth areas.

2. Conduct a **traffic analysis in specific areas** to confirm street capacity for increased density.

3. Conduct **utility verification on specific areas** to confirm utility infrastructure capacity (namely, water and sewer) to accommodate increased density. This was conducted at a high level as part of the Development Feasibility Analysis project but was not included as part of this study.

Appendix A. Housing Opportunity Area Boundaries Report

MEMORANDUM

To:	Jacob Armstrong, County of San Diego Damon Davis, County of San Diego
From:	Stephen Cook, TE, Intersecting Metrics
Date:	September 6, 2024
Regarding:	**Transit Opportunity Areas Boundaries – Methodology**

The purpose of this memo is to document the methodology and data sources used to develop the boundaries for the Transit Opportunity Areas (TOA) within the unincorporated portions of San Diego County (County). The concept of a TOA and its benefits to the County are outlined in the *Potential Transit Expansion within the County of San Diego Memo, November 9, 2021* (November 2021 Memo), which is included as **Attachment 1.**

As discussed in the November 2021 Memo, the purpose of TOAs is to capitalize on the future quality transit services that are planned to be implemented within the County by Year 2050. However, for future quality transit services to be extended to these areas, a level of land use density needs to be realized in order to attract sufficient transit ridership and justify the associated implementation and operational costs. Taking this into account, to be designated as a TOA, a parcel must meet two separate criteria; first it must have access to future quality transit services, and second there must be sufficient land use density (existing or potential) to support those quality transit services. Prioritizing urban style development within the identified TOAs will help to ensure that future quality transit services will be extended to the County, and ultimately, help meet its goals to reduce daily vehicle miles traveled (VMT) and greenhouse gas (GHG) emissions. As such, the land use zoning and densities in areas that are identified as TOAs will also be reviewed and potentially increased to attract future transit and create a more urban environment. The land use zoning and density review will be conducted in a subsequent report.

1.0 TOA Index

To identify the specific TOAs, an index was developed and applied to the parcels within a half-mile buffer of future transit lines (study area) per SANDAG's *2021 Regional Plan*. The index was used to measure if sufficient transit access may become available, and if the area/parcel can accommodate the land use density required to warrant and attract the planned transit services. As shown in **Figure 1**, the index applies two points for each identified planned quality transit service in which a parcel is located within a half mile of. A parcel is awarded three points if it is located within a half mile of a planned future transit stop. Planned transit stops are awarded a higher number of points as there is more certainty that future high quality transit will be available at these locations, and it shows that the region is planning to invest within these areas. Finally, a parcel is awarded points if it is located in specialized areas (Mobility Hubs or designated County Village Areas) or has access to existing infrastructure that is needed to accommodate growth, such as water and/or sewer. The total number of points a parcel receives is then summed to identify the total index score. Parcels with a total score of four or more points are identified as potential TOAs. The criteria and the designated amount of points a parcel received if it qualifies are explained in detail in **Attachment 2**.

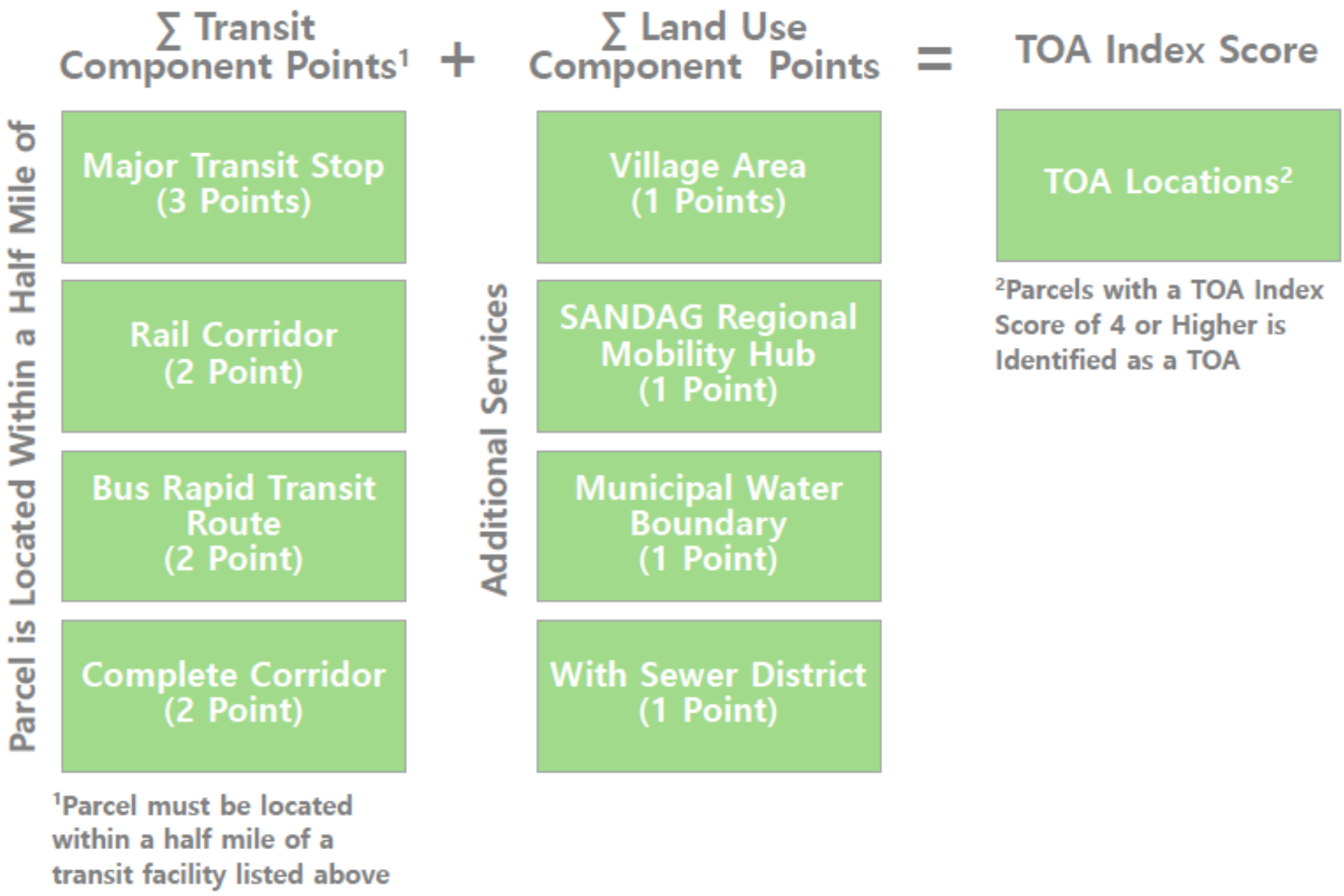


Figure 1: Transit Opportunity Area Identification Methodology Flowchart

2.0 Future Transit Access

Future transit routes and facilities within the County were identified based on the improvements outlined in Appendix A of SANDAG's *2021 Regional Plan.* The 2021 Regional Plan sets the vision, plan, timing, and funding allocation for a region's transportation network including transit services and facilities. Thus, it can be assumed that if sufficient land use densities are developed within these areas, then quality transit to service will be implemented to support them. For this analysis, only regional transit services such as rail, light rail, Bus Rapid Transit, express bus, and regional bus services are identified, as these are the types services that would qualify as a major transit corridor[1] and create a future transit priority area[2]. **Figure 2** displays the proposed buildout of the regional transit network. This network was used as the backbone to identify the areas within the County that will have future access to quality transit services.

Figure 3 shows the areas in the County located within a half-mile of the future quality transit service(s). This buffer was used as the study area to identify parcels that may be able to provide sufficient land use densities (existing or potential) to warrant future quality transit services.

3.0 Available Services

The TOA index also awards points for other infrastructure and services a parcel may have access to, allowing for higher density development. The following four service categories were included in the index, each carrying a weight of one point:

Village Areas – The County of San Diego General Plan identifies a series of designated areas with higher density development and where mixed-use development will be concentrated, known as Village Areas. The main goal of the Village Areas is to support multi-modal and mixed-use travel. Since the General Plan has already designated these areas as being higher density and mixed-use, they are prioritized for being included in the TOA.

Regional Mobility Hub - As outlined in SANDAG's 2021 Regional Plan, Mobility Hubs are communities with a high concentration of people, destinations, and travel choices. The 2021 Regional Plan prioritizes transit services and multi-modal travel within these areas through grant funding and other programs. Areas within a Regional Mobility Hub are more likely to receive future transit stops and other first mile / last mile services and infrastructure. As such, these areas were also prioritized for being included in the TOA.

Municipal Water Authority Boundary – Not all of the unincorporated areas have access to municipal waterlines. Access to utilities, such as water, is critical for higher density development. Therefore, parcels located within the San Diego County Water Authority boundary are prioritized to being included in the TOA.

Sewer District – Similar to water, access to sewer services can play an important role in accommodating new growth. Therefore, parcels located within an existing sewer district are also prioritized for being included in the TOA.

Figure 4 displays the areas that provide the additional services outlined above.

[1] California Public Resources Code Section 21155
[2] California Public Resources Code Section 21099

EXHIBIT A

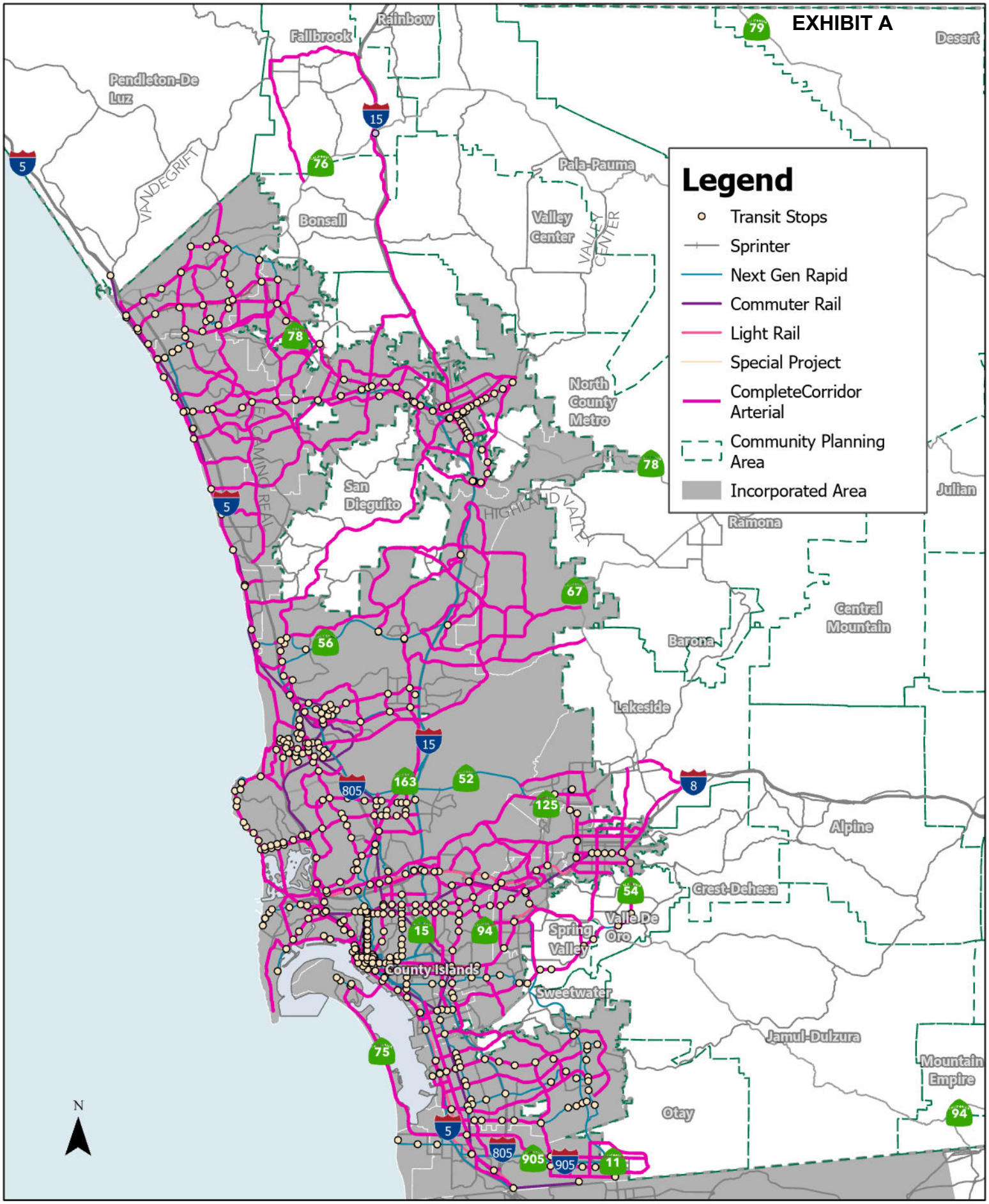


Figure 2

Planned Regional Transit Network

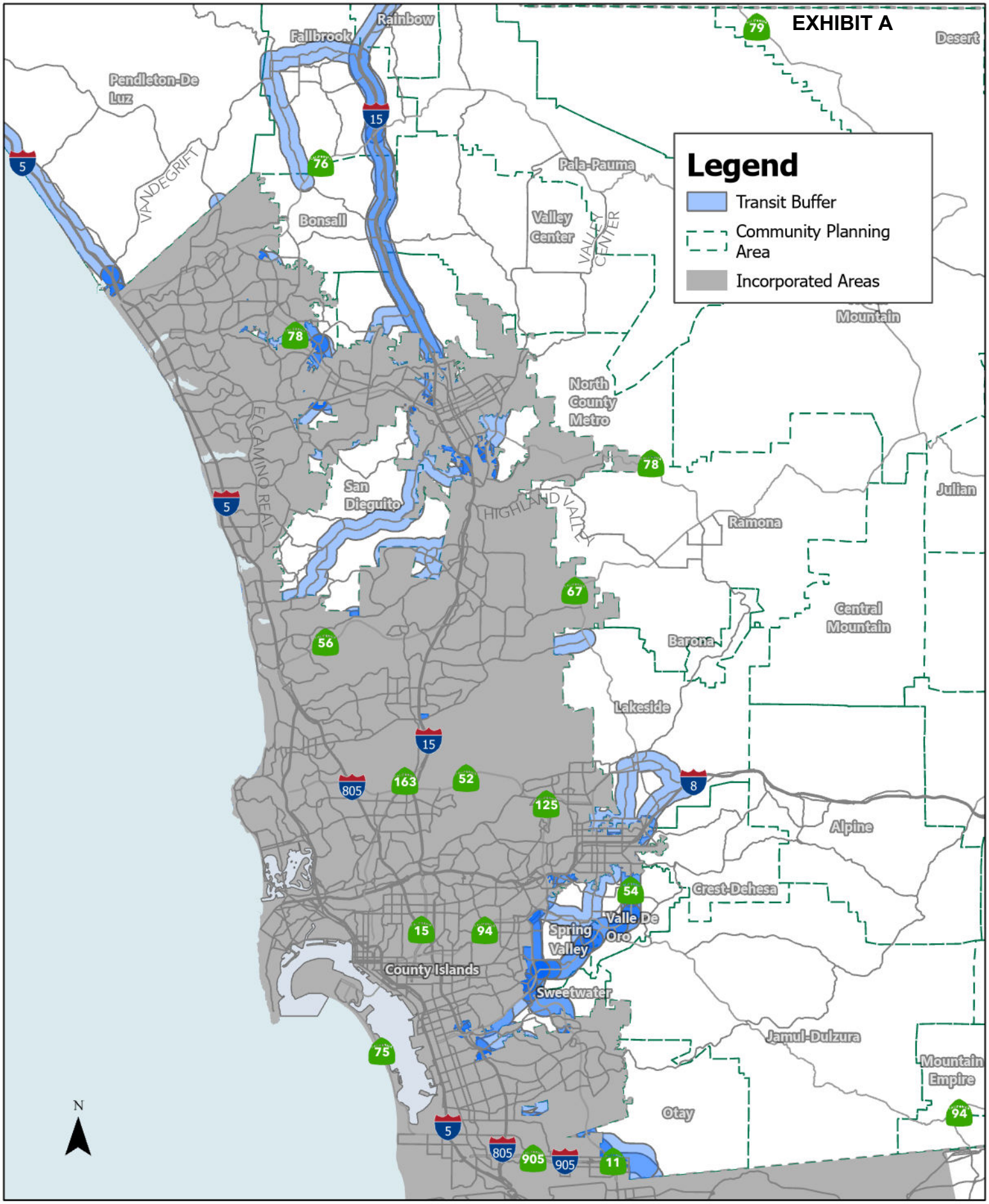


Figure 3

Future Transit Buffer

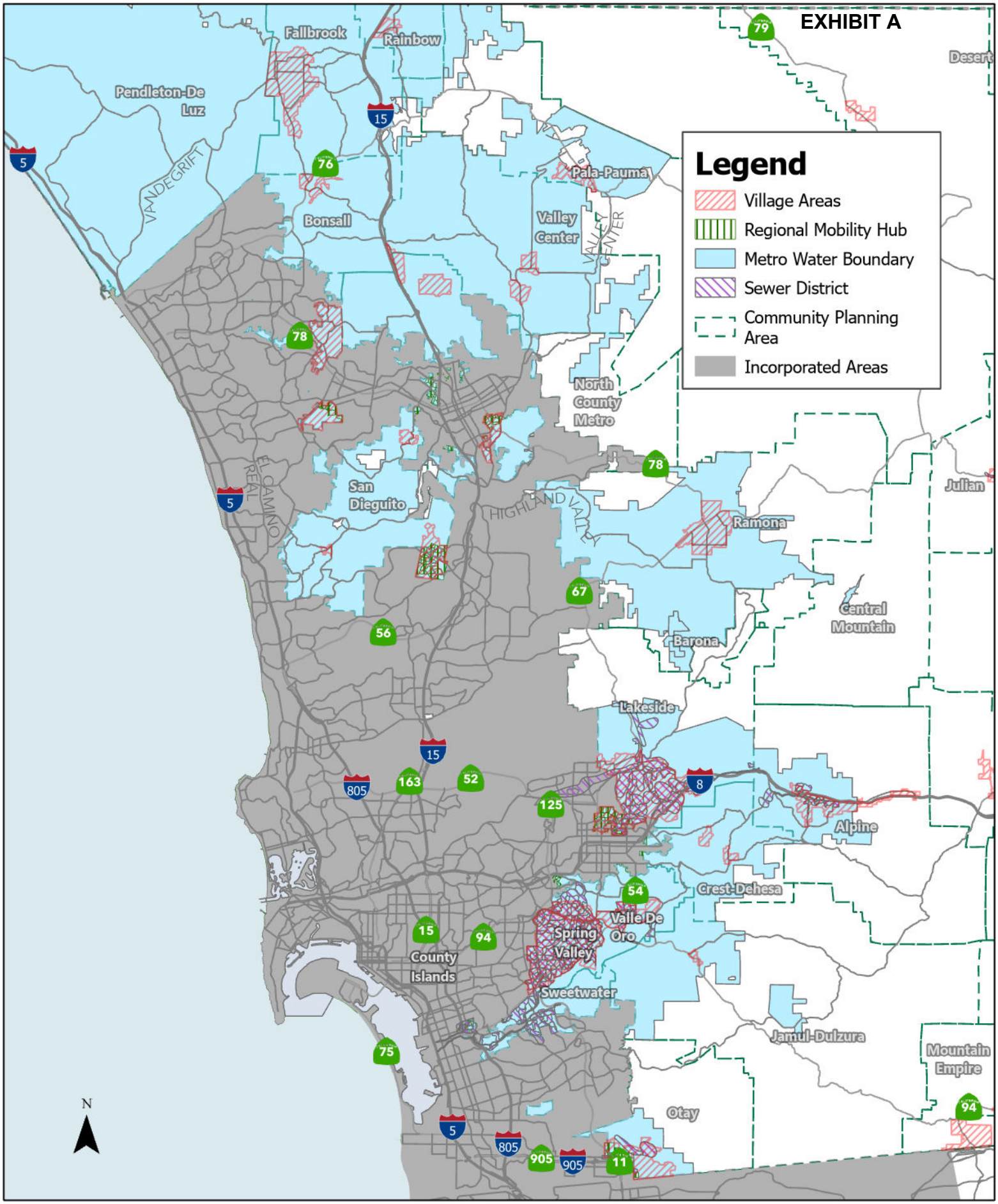


Figure 4
Available Services

4.0 Excluded Areas

The County of San Diego has several environmentally sensitive areas that are not appropriate for development, let alone higher density development. Therefore, these areas have been excluded from the TOAs. Parcels located within the following areas were excluded from being included in the TOA.

- Sensitive Animal Habitats
- Sensitive Biological Areas
- Forest Conservation Areas
- 100 Year Floodplain

Brief descriptions and sources for the data used in the analysis is provided in **Attachment 3**.

VMT efficient areas and identified infill areas were also not included in the TOA as they have already been identified as not having a VMT related impact. Both the VMT efficient areas and identified infill areas are established in the County's Transportation Study Guidelines, and are identified in the County's SB-743 Location-Based Screening Maps[3].

The initial TOA Boundaries, based on the TOA index and excluded areas is displayed in **Figure 5**.

5.0 Area Refinements

After the application of the TOA index, the eligible parcels within the TOA boundary were further refined based on the following parcel level attributes:

High VMT Per Capita Area – A primary goal of the TOA is to create more areas within the unincorporated portions of the County for sustainable growth. To help ensure that the proposed growth within the TOAs will be sustainable, all parcels that are projected to have a VMT / Capita that is above 110% of the regional mean were excluded from the TOA. The VMT / Capita was derived based on the SANDAG Series 14 Base Year (Year 2016) transportation forecast, and the Traffic Analysis Zone (TAZ) in which the parcel is located in.

Non-Taxable Parcels – Parcels that are currently excluded from paying property tax were also excluded from the TOA. Non-taxable parcels are typically owned by government agencies, preserves, or other sensitive areas, or are owned by private non-profit institutions. The non-taxable parcels are identified in the assessor's parcel records.

Minimum Parcel Size – Parcels that are less than an acre in size are assumed to have a lower probability to redevelop at a higher density. Therefore, all parcels with a developable area of less than an acre were excluded from the TOA.

Zoning – Not all zoning is compatible with residential development; therefore, parcels located within commercial, industrial, or special purpose zoning were not included within the TOAs. It should be noted that residential development is allowed within some commercial zoning; however, they were excluded from the TOAs since the residential densities are directly connected to the commercial zoning.

[3] County of San Diego SB 743 Location-Based Screening Maps (sandiegocounty.gov)

6.0 Developable Areas - Net Developable Acreage

Due to geographic features, not all of the areas within the TOAs are developable. Therefore, the net developable acreage of a parcel is established by subtracting the areas that are occupied by either steep slopes (45%) or identified wetlands.

7.0 Final TOA Boundaries

The final TOA boundaries were established by applying the methodologies and criteria outlined in the previous sections. **Figure 6** displays the parcels within the County that qualify as a TOA. **Table 1** displays a summary of the TOA.

Table 1: TOA Summary

Metric	TOA
Total Number of Parcels	6,500
Total Acres	8,053.7
Net Developable Acres	5,695.7

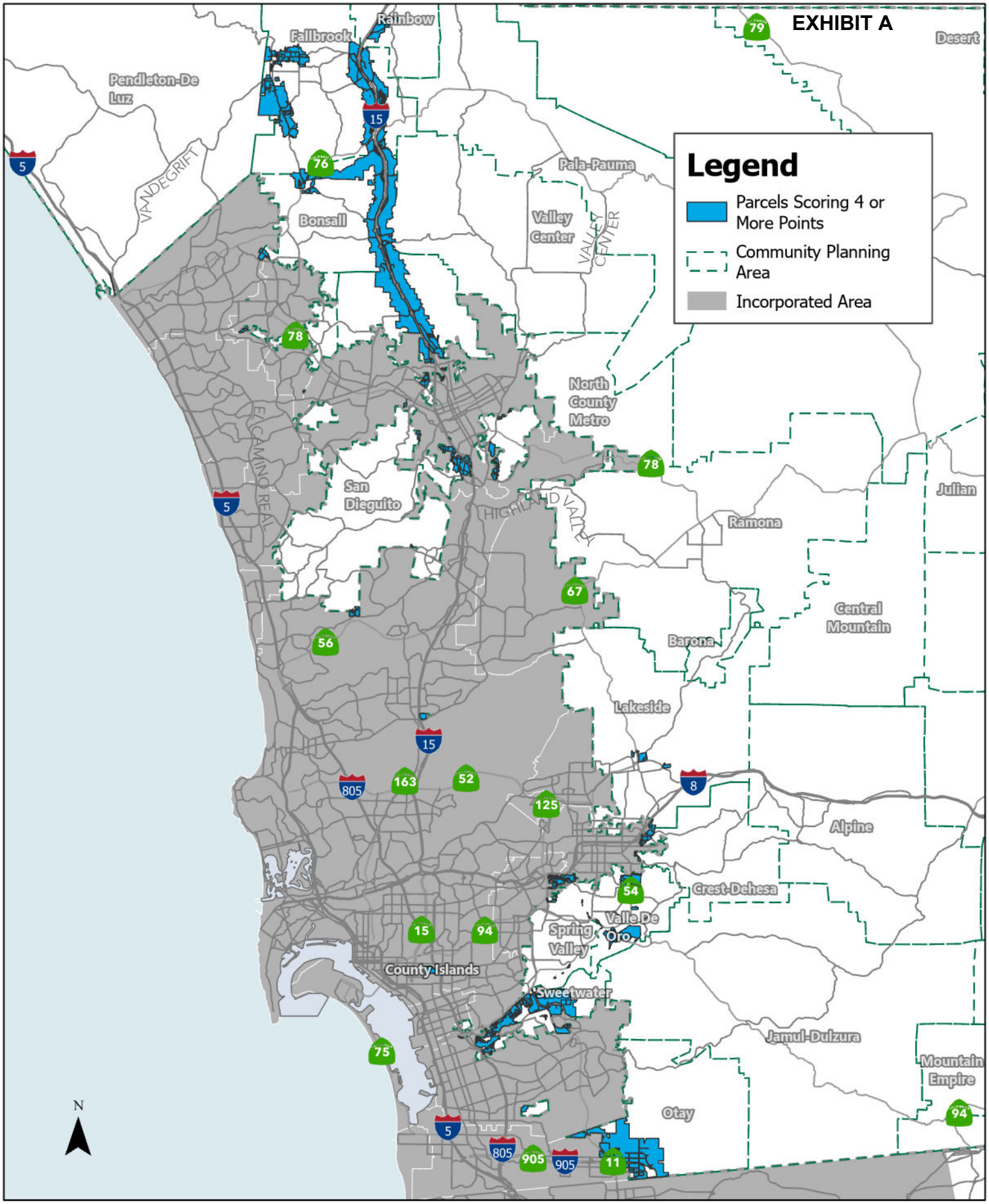


Figure 5

Parcels Scoring 4 or More TOA Index Points

County of San Diego TOA

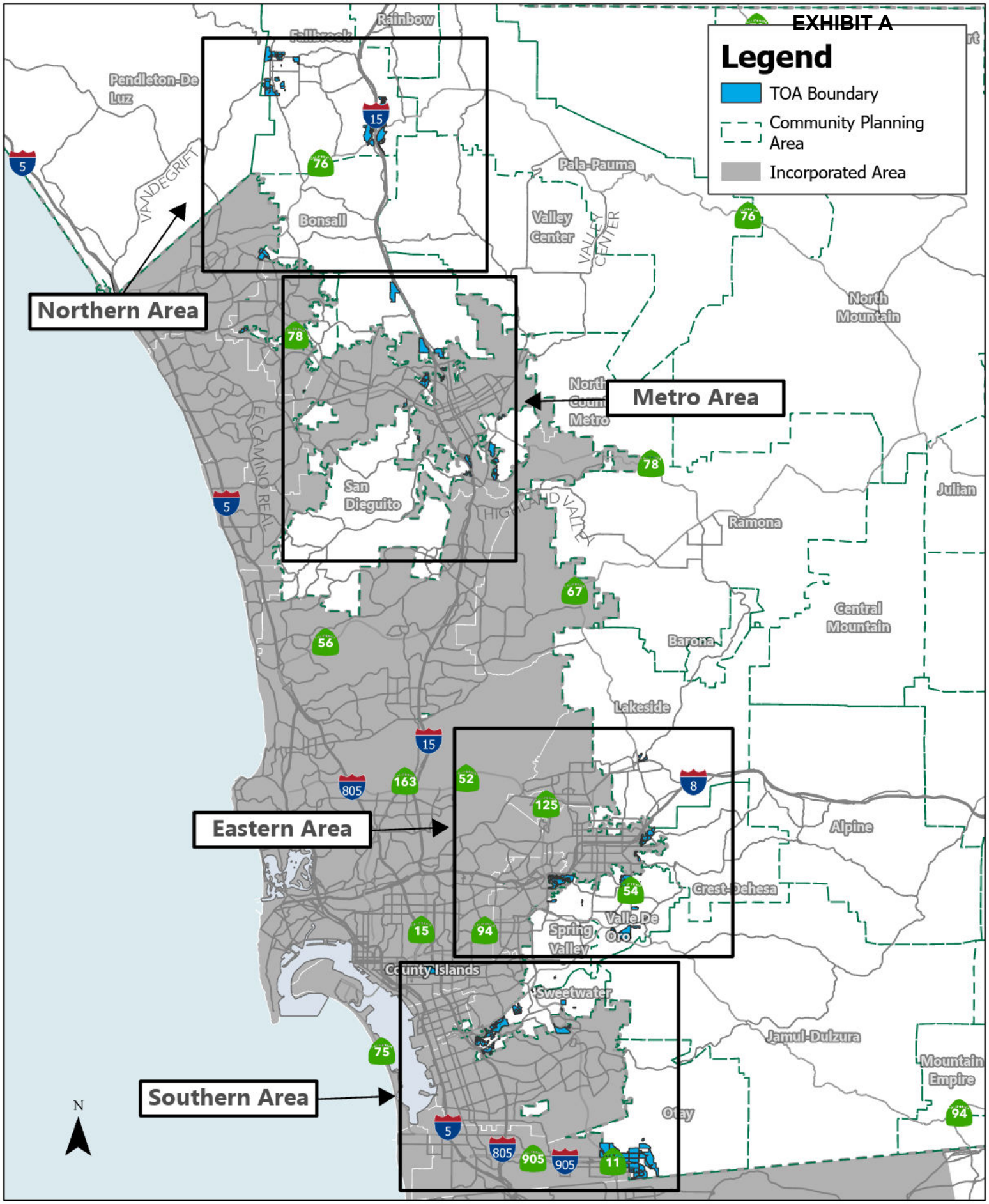


Figure 6

TOA Boundaries - Key Map

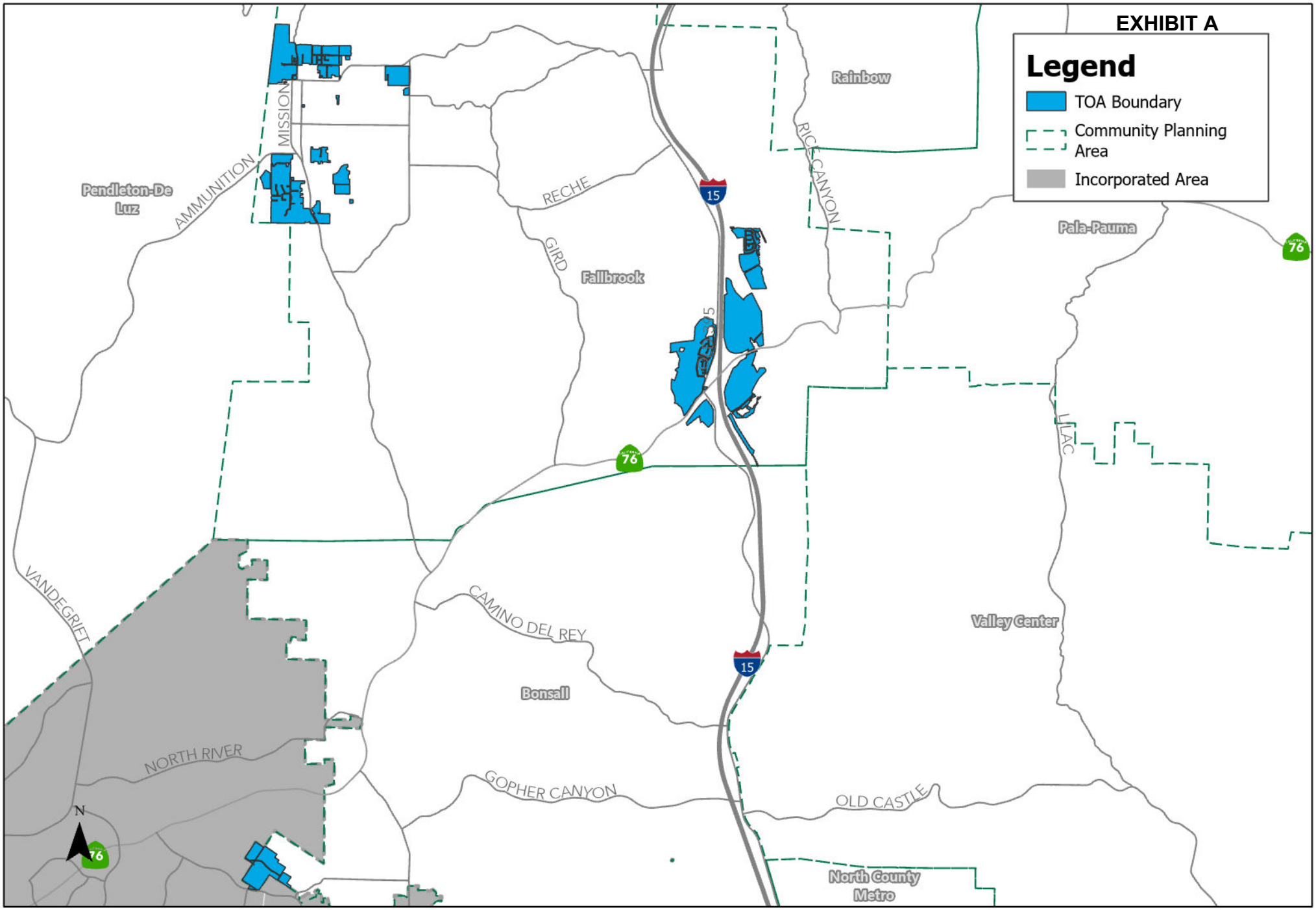


Figure 6a

TOA Boundary - Northern Area

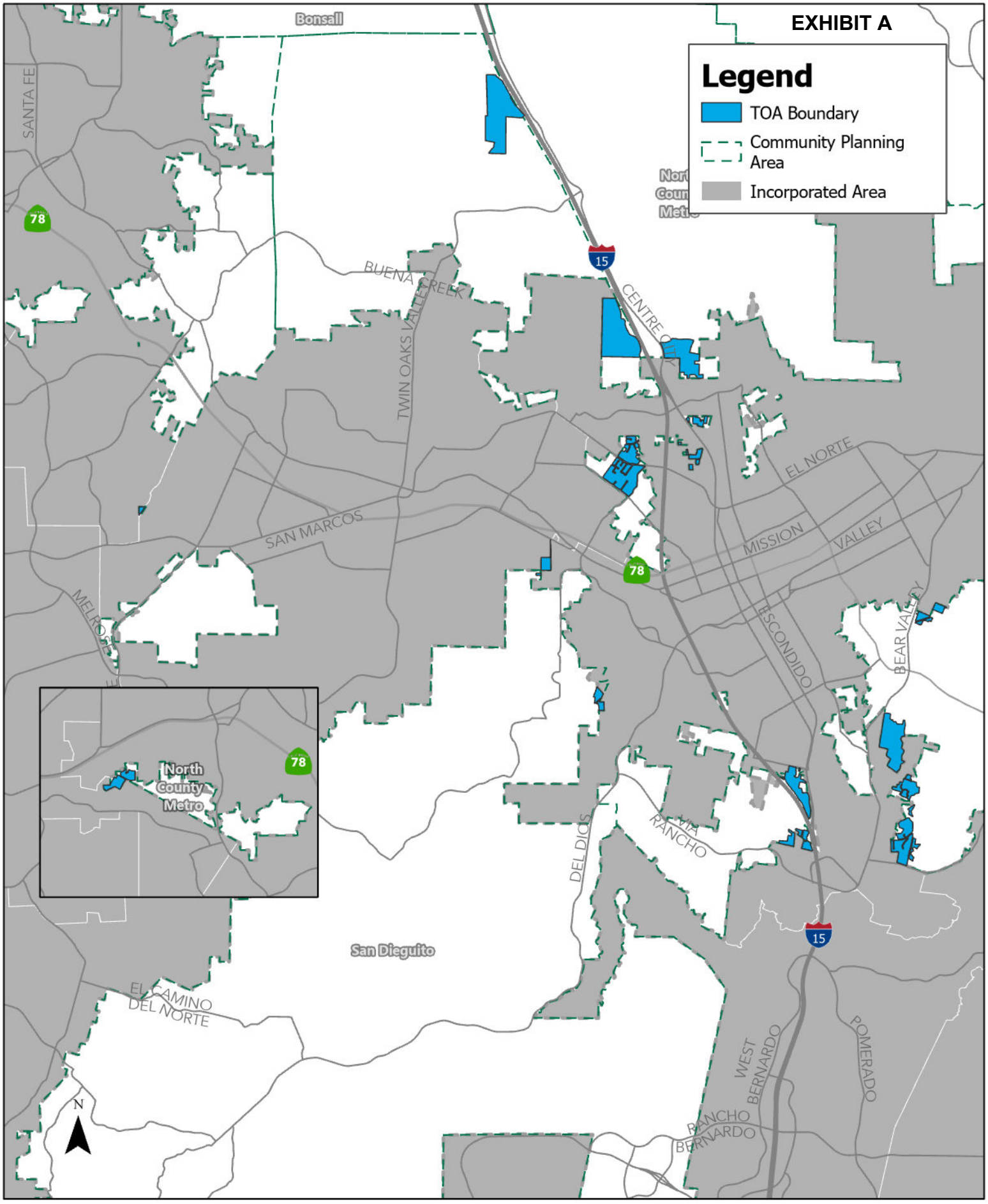
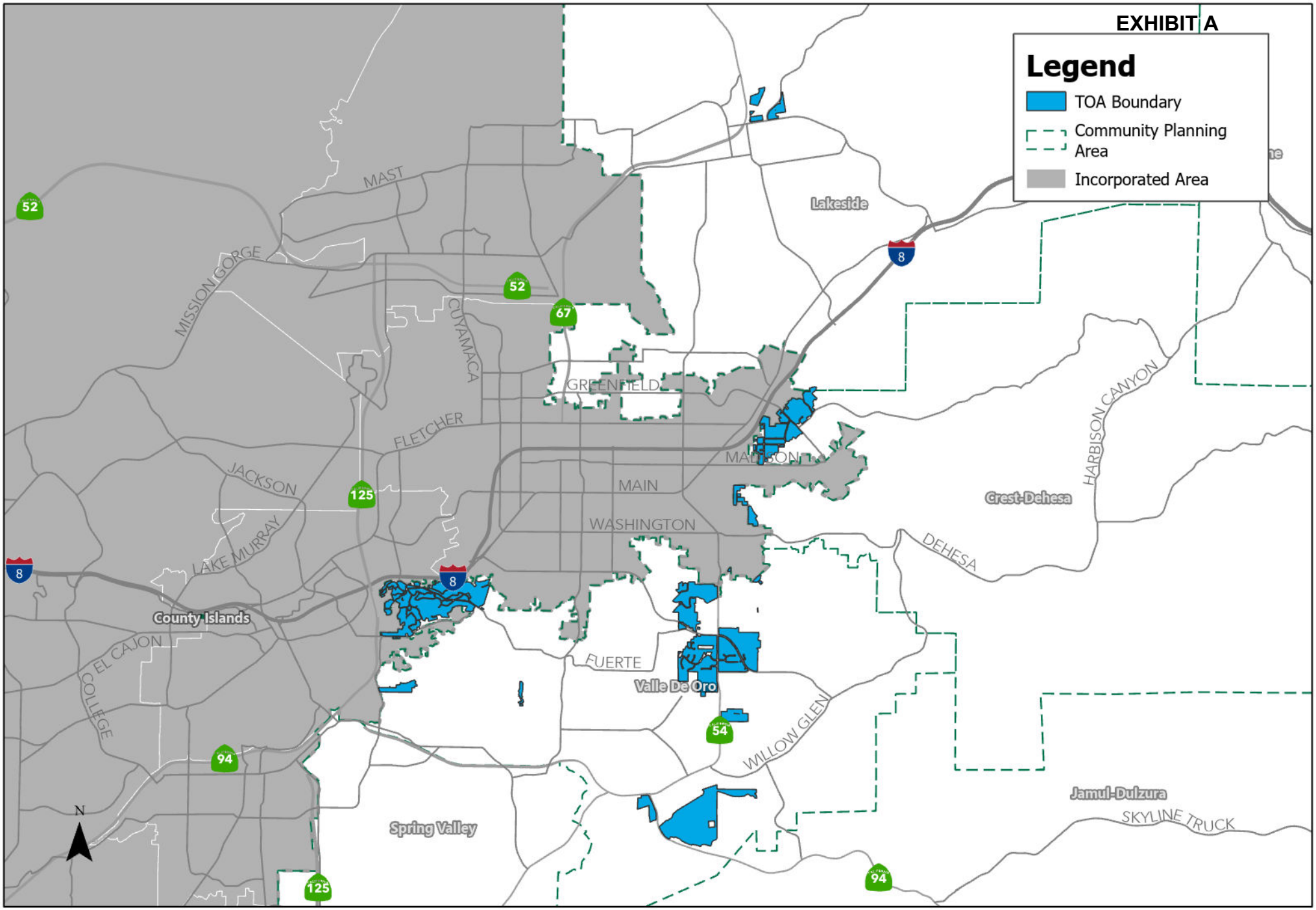


Figure 6b

TOA Boundary Metro Area

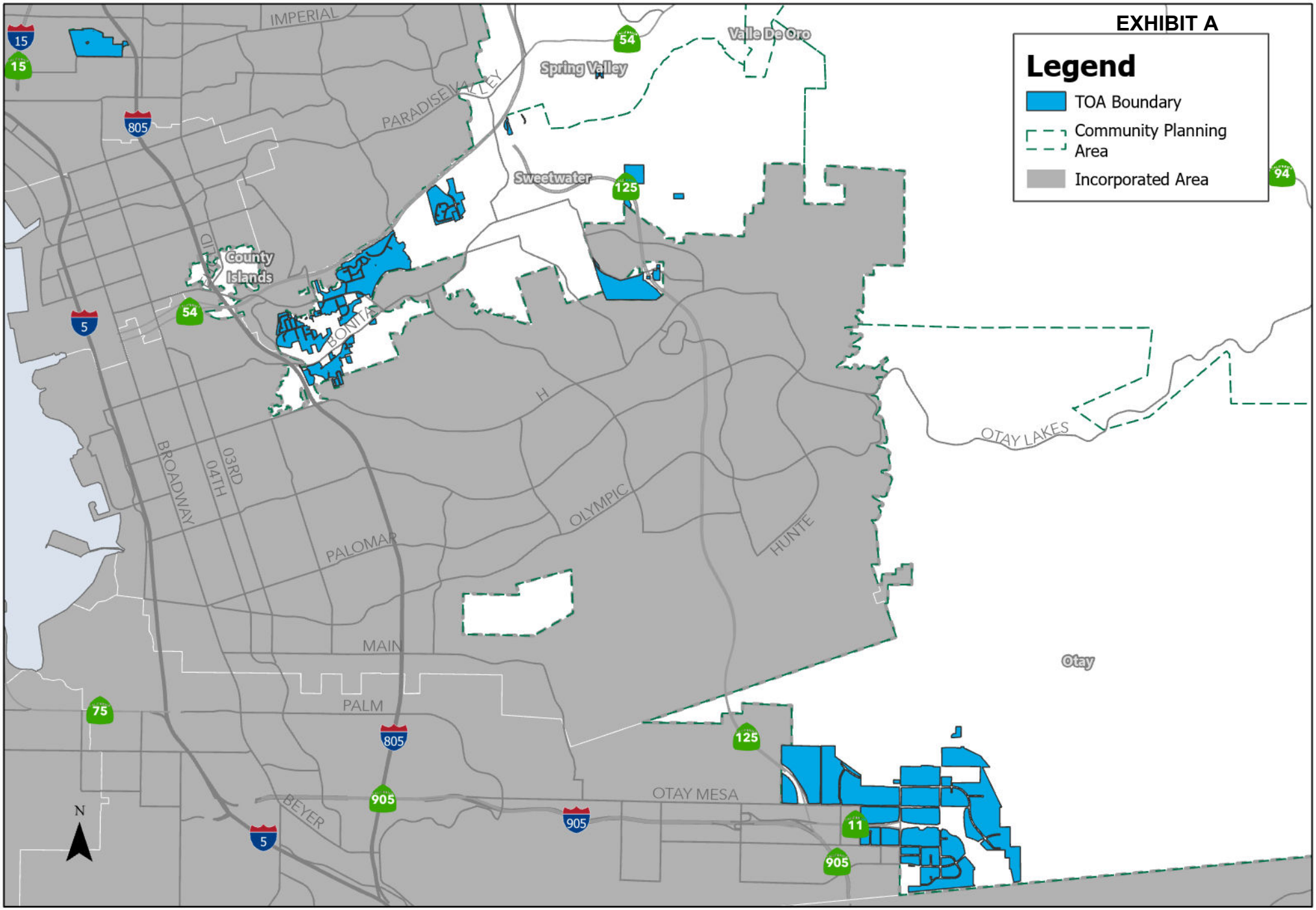


Intersecting Metrics

County of San Diego TOA

Figure 6c

TOA Boundary Eastern Area



Intersecting Metrics

County of San Diego TOA

Figure 6d

TOA Boundary Southern Area

Attachment 1
Potential Transit Expansion within the County of San Diego Memo

Attachment 2
Index Criteria – Definition and Points

Transit Component

Major Transit Stops – Existing and proposed transit stops along major routes within the County. Major transit stops were derived based on SANDAGs Series 14 ABM2+ model. It should be noted that some of the proposed future transit lines have not identified potential stop locations. As such, this does not represent a comprehensive list of all future transit stops. Major transit stops were used to identify Transit Priority Areas (TPA) that may be established in the future. Parcels within a half-mile of a major transit stop were awarded three points since infill developments within TPAs are consistent with the goals set within Senate Bill 743 (SB-743).

Rail Corridors – This includes both existing and future rail corridors that provide transit services, such as the San Diego SPRINTER, as well as planned rail corridor routes envisioned by the 2021 Regional Plan. It should be noted that the 2021 Regional Plan does not identify the specific technology that will utilize future rail corridors, but it does assume that these corridors will services by high frequency railed transit (passenger rail, light rail, subway, etc.). Rail corridors are considered major transit corridors in which new development would have a less than significant VMT related impact, or new major transit stations can be implemented to create a TPA. Since all future transit stops are not known, it cannot be guaranteed that a station will be located within a half mile of a development. Therefore, one point is awarded for parcels within a half mile of existing and future rail corridors.

Bus Rapid Transit Routes – Both Route 225 (South Bay Rapid) and Route 235 (I-15 Rapid) currently operate within the County. Several new bus rapid transit routes are identified within the 2021 Regional Plan (branded as Next Gen Rapid). Similar to rail corridors, Next Gen Rapid routes are considered major transit corridors in which new development would have a less than significant VMT related impact, or new major transit stations can be implemented to create a TPA. Since all future transit stops are not known, it cannot be guaranteed that a station will be located within a half mile of a development. Therefore, one point is awarded for parcels within a half mile of existing and future Bus Rapid Transit corridors.

Complete Corridors - The 2021 Regional Plan also identifies a series of Complete Corridors within the regional highway network where additional transit service and improvements are envisioned. Complete Corridors will be designed to give buses and other transit vehicles dedicated space on roadways that are currently identified to have excess vehicular capacity. Complete Corridors will also offer transit vehicles a traffic signal system that gives them priority over other traffic; thus, reducing travel times and improving service. These improvements should provide the opportunity to implement additional future high-frequency regional transit services (Rapid bus or Express bus) within the Unincorporated County. As such, these corridors have the potential to become major transit corridors in the future. Since the transit technologies, services, and stops have not been defined along these corridors, it cannot be guaranteed that a station will be located within a half mile of a development. Therefore, one point is awarded for parcels within a half mile of future Complete Corridors.

Additional Services Component

Village Areas – The County of San Diego General Plan identifies a series of designated areas with higher density development and mixed-use development will be concentrated, known as Village Areas. The main goal of the Village Areas is to support multi-modal and mixed-use travel, as outlined in Goal LU-5.1 of the County of San Diego General Plan:

> Reduction of Vehicle Trips within Communities. Incorporate a mixture of uses within Villages and Rural Villages and plan residential densities at a level that support multi-modal transportation, including walking, bicycling, and the use of public transit, when appropriate.

This makes the identified Village Areas ideal locations to increase land use densities to draw and expand more regional transit services and Mobility Hub locations to the Unincorporated County. As such, parcels located within these areas are awarded one point.

Regional Mobility Hubs - As outlined in the 2021 Regional Plan, Mobility Hubs are communities with a high concentration of people, destinations, and travel choices. Mobility Hubs can span one, two, or even a few miles based on community characteristics. Mobility Hubs will be uniquely designed to fulfill a variety of travel needs while strengthening a sense of place. A fully connected network of regional Mobility Hubs ensures seamless connections to major work, school, shopping, and leisure destinations using transit and Flexible Fleets. Infrastructure improvements associated with the regional transit network, Complete Corridors, and Mobility Hubs will ensure that Flexible Fleets have safe spaces to use streets and places to charge and park vehicles at key destinations. Based on these identified features, Mobility Hubs are generally associated with the development that is encouraged within TPAs. As such, parcels located within these areas are awarded one point.

Municipal Water Authority Boundary – Not all of the unincorporated areas have access to municipal waterlines. Access to utilities, such as water, is critical for higher density development. Therefore, parcels located within the San Diego County Water Authority boundary are prioritized.

Sewer District – Similar to water, access to sewer services can play an important role in accommodating new growth. Therefore, parcels located within an existing sewer district are also prioritized.

Attachment 3
TOA Source Data

TOA Source Data

Category	Metric	Definition	Source	Year	Analysis	Field Used	Field Description
Steep Slopes	Steep Slopes	Steep slopes as defined by County of San Diego Planning Development Services. Those slopes greater than 25% slope are considered steep.	SANGIS	8/28/2015	Reduce potential building area within a parcel based on the area of present Steep Slopes.	All	N/A
Environment	Habitat	Habitat Evaluation Model - prioritizing critical biological resource areas with the region.	SANGIS	6/18/2008	High and Very High Areas used to screen out parcels.	DESC_	Description relating to the potential presence of 93 target species and to factors that contribute to high biodiversity
	Wetlands	Geospatially referenced information on the status, extent, characteristics and functions of wetlands, riparian, deepwater, and related aquatic habitats.	SANGIS	12/14/2023	Reduce potential building area within a parcel based on the area of present wetlands.	All	N/A
	Forest Conservaton	Areas identified in the Forest Conservation Initiative (FCI).	SANGIS	N/A	Screen out parcels within FCIs	All	N/A

TOA Source Data

Category	Metric	Definition	Source	Year	Analysis	Field Used	Field Description
Environmental	Sensitive Areas	This dataset is a combination of six elements of environmentally sensitive areas: 1. Multiple Species Conservation Program (MSCP) Hardline Preserve designation, 2. Preserved land within County of San Diego South County MSCP, 3. County of San Diego South County MSCP Pre-Approved Mitigation Area (PAMA) designation, 4. Clean Water Act section 303(d) water bodies listed by the California Water Resources Control Board in 2016 with a 200-foot buffer, 5. Waters that support habitats necessary for the survival and successful maintenance of plant or animal species established under state and/or federal law as rare, threatened, or endangered from 2007, 6. Areas of Significant Biological Concern (ASBC).	SANGIS	3/12/2019	Screen out parcels and/or reduce potential building areas based on the area of sensitive areas.	All	N/A

TOA Source Data

Category	Metric	Definition	Source	Year	Analysis	Field Used	Field Description
Environmental	Floodplain	Represents areas most likely to be subjected to inundation by a 100-year flood.	SANGIS	6/2/2022	Screen out parcels and/or reduce potential building areas based on the area of the floodplains.	All	N/A
Sewer	Sewer Service Area	Sanitation District Service Area Boundary – This layer would be utilized to determine if a specific San Diego County unincorporated property is located within the Districts sewer service boundary or proximity thereof.	SANGIS	9/23/2021	Identify and place bonus on areas with sewer access	All	N/A
Water	Metro Water	Parcels located in the metro water district	SANGIS	8/28/2015	Provides a bonus to areas served by metro water	All	N/A
Fire	Local Fire	Very High Fire Hazard Severity Zones in the Local Responsibility Area	Cal Fie	4/1/2024	Screen our parcels in Very High Fire Areas	All	N/A
	State Fire	Fire Hazard Severity Zones (FHSZ) in the State Responsibility Area	Cal Fire	4/1/2024	Screen our parcels in High and Very High Fire Areas	FHSZ	N/A

Appendix B. Market Assessment of Increased Housing Density

Market Assessment of Increased Housing Density

Transit Opportunity Area (TOA) Assessment

County of San Diego

Keyser Marston Associates, Inc.

April 30, 2026

KEYSER MARSTON
ASSOCIATES

I. INTRODUCTION

As part of a Transit Opportunity Area (TOA) assessment planning effort, the County of San Diego (County) requested that Keyser Marston Associates, Inc. (KMA) assess overall market potential of increased housing density in select areas in the unincorporated area of the County. This report consolidates the findings of two (2) separate KMA market assessments conducted in 2024 and 2025, respectively, to provide a comprehensive evaluation of residential development potential across all studied TOAs.

The 2024 assessment evaluated three (3) community planning areas (CPA): North County Metro East, Sweetwater, and Otay. The 2025 assessment expanded the scope to seven (7) additional areas: Alpine/Crest/Dehesa/Jamul, Fallbrook, Lakeside, North County Metro North, Ramona, Spring Valley, and Valley Center. Together, these two studies provide financial feasibility findings across ten (10) TOAs within the unincorporated County. As the assessments were conducted in separate years, County-level benchmarks reflect 2024 and 2025 data, respectively, as presented in each report's appendix tables.

In both assessments, the TOA parcels were identified by Intersecting Metrics (IM) based on an index applied to parcels within a half-mile buffer of future transit lines. The parcels were then ranked on a points system to determine which parcels meet the minimum criteria to be considered a TOA parcel candidate. In order to assess whether the County should allow for increased density on select parcels within the TOAs, KMA prepared high-level assessments of market conditions impacting development of rental and for-sale housing product types.

II. METHODOLOGY

Based on a review of the current market factors impacting residential development, KMA evaluated market support for increased housing density. This analysis included a review of demographic characteristics such as median household income and population; projects currently under construction and in the pipeline; recent land sales for new development; proximity to transit and the prevalence of neighborhood amenities; and median sales prices for detached/attached single-family homes. KMA also reviewed the average year built, number of apartment units, and average effective monthly rents for multi-family properties.

It should be noted that KMA has not received nor reviewed information from the County related to building typology for residential projects in the pipeline in the various TOA trade rings. KMA also has not received nor reviewed information from the County related to the availability of water and sewer infrastructure in the various TOAs. We have made reasonable assumptions regarding which TOAs or sub-areas rely primarily on private wells and/or septic systems but have not independently verified these estimates.

Market demand was then evaluated across three timeframes -- near-term (0 to 5 years), mid-term (5 to 10 years), and long-term (10 to 20 years) -- using the following metrics: “strong” (highly likely to occur), “moderate” (likely to occur), and “weak” (unlikely to occur).

III. NATIONAL AND REGIONAL RESIDENTIAL TRENDS

At the national level, the housing market remains stable but is constrained by affordability challenges. Home prices are experiencing modest growth increases but interest rates are declining, which will increase buyer demand. The San Diego region is one of the highest priced real estate markets in the nation with the median single-family detached home priced at over a $1 million (September 2025). Residential development continues to be adversely impacted by the high cost of land and construction materials, shortage of labor, and high interest rates. Sales volumes for detached and attached single-family homes are up from the prior year by 6.7% and 12.5%, respectively. The number of housing units on the market increased by 19% for detached homes and 45% for attached homes, since September 2024. These market indicators suggest strong buyer interest. High home prices demonstrate demand amid limited supply, while declining mortgage rates improve affordability, and encourage more buyers to enter the for-sale housing market. The resulting increase in sales volume confirms that activity remains elevated, reflecting confidence among buyers.

Conversely, San Diego’s rental market is constrained, reflecting limited new supply and strong regional demand. High home prices and borrowing costs have kept many potential buyers in the rental market. Median household income in the region is relatively strong compared to national levels, but rents have risen much faster, forcing many households to spend more than 30% of their income on housing. This affordability gap has made it increasingly difficult for middle-income and lower-income renters to secure housing without becoming cost burdened. The region’s strong employment base, desirable coastal location, and constrained land supply contribute to elevated rent levels well above the national median. Rents in the County are rising faster than the national average with an estimated average annual growth rate of 4% since 2024. Multi-family residential development vacancy was 5.0% in the third quarter of 2025, with an average asking monthly rent of $2,459. Similar to for-sale housing trends, these indicators demonstrate strong demand for multi-family rental housing within the County.

IV. MARKET ASSESSSMENT FOR INCREASED HOUSING DENSITY

The following section summarizes the KMA market assessment and key findings regarding the overall potential for increased housing density within each TOA.

Alpine/Crest/Dehesa/Jamul

In the near- to mid-term, the Alpine/Crest/Dehesa/Jamul TOA is expected to demonstrate weak market demand for higher-density housing due to the area’s rural community character, distance from high-

quality employment, and low existing population base. The area's limited transit access and sparse neighborhood amenities, including few grocery stores, medical services, and retail options, further constrain near-term development potential. The lack of active multi-family projects or dense product types in the pipeline further evidence the lack of market demand. However, the area's relatively high household incomes ($128,415), strong single-family sales prices ($815,000 per unit), and robust rent levels ($2,099 per month) suggest that the area can support higher-density housing at moderate levels in the long-term.

Fallbrook

In the near- and mid-term, Fallbrook's potential for higher-density housing is moderate, supported by recent planning initiatives, abundant neighborhood amenities, and proximity to Camp Pendleton and North County employment centers. The area benefits from significant transit access with connections to surrounding job markets and local services. It currently experiences low effective monthly rents ($1,654) for market-rate units and comparatively low residential land values at $10 per SF versus the County average of $35 per SF, reflecting limited demand for higher-density product. However, Fallbrook's unique community identity, moderate median single-family sales price ($725,000 per unit), and long-term planning vision as presented in the Fallbrook Sub-Area Plan indicate growing market strengths. As the area improves connectivity to regional job centers and continues to develop a variety of land uses, demand for higher density housing is anticipated to be strong in the long-term.

Lakeside

In the near-term, Lakeside demonstrates moderate potential for increased housing density, supported by its established community character, strong transit access, and abundance of neighborhood amenities. These amenities include parks, baseball fields, lakes, equestrian facilities, and the Lakeside Rodeo Arena. The area benefits from proximity to State Route 67 (SR-67) and Interstate 8 (I-8). In addition, the area's connectivity to regional job centers and local services contributes to relatively high effective monthly rents ($2,030) and strong median single-family home prices ($760,000 per unit). Land values averaging $39 per SF, slightly above the County average of $35, further reflect underlying market strength. Over the mid- to long-term, Lakeside is expected to demonstrate strong market potential for higher-density housing.

North County Metro East

In the near-term, the North County Metro East TOA demonstrates moderate market potential for increased housing density, constrained by existing low-density zoning, challenging topography with limited flat vacant land, and proximity to habitat preserves and fire hazard areas. Over the mid- to long-term, the area is expected to demonstrate strong market potential for higher-density housing. This expectation is supported by the area's proximity to major high-quality employment hubs including

Sorrento Valley, University City, and Torrey Pines/La Jolla; access to Interstate 15 (I-15) and Interstate 5 (I-5); connectivity to the North County Transit District Sprinter and Rapid Bus Service; proximity to high-quality educational facilities within the Poway Unified School District; and existing infrastructure to support residential development.

North County Metro North

The North County Metro North TOA demonstrates strong market potential for higher-density housing in the near-, mid-, and long-term, supported by multi-modal transit access (I-15, Sprinter, Rapid Bus Service), abundant neighborhood amenities, and proximity to major employment centers. The area's high median household income ($109,084) and well-established neighborhoods maintain steady housing demand. When compared to the other TOAs, this area exhibits the highest effective monthly rents ($2,501) as well as the highest single-family median sales price ($995,000 per unit), reflecting its competitive market position. Continued demand can be expected along key corridors serving nearby job centers, where new multi-family and mixed-use development is most likely to occur.

Otay

In the near- to mid-term, the Otay TOA demonstrates weak market potential for increased housing density, reflecting the incompatibility between existing industrial and warehouse uses and residential development. This is further evidenced by low land sales values per SF, limited construction activity, and the absence of supporting infrastructure, including water, sewer, electrical, and roadway/streetscape improvements. Constraints limiting the potential to achieve higher market sales prices and rents needed to support high-density housing in the Otay TOA include:

- *Competition from the buildout of eastern Chula Vista*[1] – existing and planned residential communities in eastern Chula Vista offer established community amenities, access to retail shops and services, and proximity to employment centers

- *Competition from the buildout of Otay Mesa*[2] – the continued buildout of Otay Mesa may offer newer residential options supported by planned community amenities, educational facilities, and proximity to transit

- *Existing surrounding industrial uses* – existing industrial activity in and around the TOA may limit residential market demand due to truck traffic, massive warehouse facilities, and noise/environmental concerns

[1] Includes specific plan areas within the City of Chula Vista's Otay Ranch General Development Plan (GDP).
[2] Includes specific plan areas within the City of San Diego's Otay Mesa Community Plan Update.

Ramona

The Ramona TOA demonstrates weak market potential for higher-density housing in the near-term, constrained by limited transit access, low population density, and relatively low rents and sales prices, averaging $1,985 per month and $632,500 per unit, respectively. The area benefits from existing grocery stores, pharmacies, restaurants, and personal services along Main Street and the SR 76 corridor. In addition, the area offers reasonable commuting access to employment hubs in Escondido, Poway, and Scripps Ranch, making it a viable ownership housing option for regional workers. As such, in the mid- to long-term, the area's market potential for increased housing density is expected to be moderate.

Spring Valley

Spring Valley demonstrates moderate near- to mid-term market potential for increased housing density, supported by existing residential infrastructure and presence of various transit options. The area is well established, with access to retail shops and services and community amenities. The area is well-connected to regional job centers in central San Diego, El Cajon, and La Mesa. Although the area experiences lower median household incomes, this proximity to major job centers and existing neighborhood amenities reinforces moderate housing demand. Strong median single-family sales prices ($799,000) and a balanced mix of owner- and renter-occupied housing also indicate stable market demand for various types of residential development. As a result, Spring Valley's demand for higher-density and mixed-use development is expected to grow to strong in the long-term.

Sweetwater

In the near- to mid-term, the Sweetwater TOA demonstrates moderate market potential for increased housing density, driven by the area's adjacency to the growing cities of Chula Vista and National City. The area is served by State Route 125 (SR-125), State Route 54 (SR-54), and Interstate 805 (I-805), and benefits from existing water, sewer, and electrical infrastructure. However, challenging topography and the presence of large open space areas that cannot be developed may discourage higher-density residential development in the near term. Over the long-term, the Sweetwater TOA is expected to demonstrate strong market potential for higher-density housing, supported by its central location within the County, freeway and transit access, proximity to neighborhood amenities, and existing infrastructure to support residential development.

Valley Center

In the near- to mid-term, Valley Center's market potential for higher-density housing is moderate, reflecting its rural setting, small population base, and limited transit access. Neighborhood amenities are sparse, with most grocery, medical, and retail services concentrated in the town center. The area's high median household income ($125,984) and high single-family sales price ($852,400 per unit) indicate

demand for low density housing, as many residents can afford larger homes situated on medium to large lots. The area's proximity to major North County employment centers such as Escondido, Oceanside, San Marcos, and Vista positions it to capture housing demand from nearby workers. Current demand for higher-density housing is moderate, though projects such as the new master-planned community, Park Circle, are expected to strengthen this demand. Over the mid-to long-term, market potential is expected to grow from moderate to strong.

Appendix A presents key information for the North County Metro East, Otay, and Sweetwater TOAs. Appendix B presents key information for the Alpine/Crest/Dehesa/Jamul, Fallbrook, Lakeside, North County Metro North, Ramona, Spring Valley, and Valley Center TOAs. Appendix C provides maps of the TOA trade ring boundaries, which were used as the basis for compiling demographics and relevant market factors. Together, these appendices summarize the market potential for increased housing density within each TOA.

APPENDIX A

2024
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

TABLE A-1

OVERVIEW OF RESIDENTIAL DEVELOPMENT TRENDS - NATIONAL
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

NATIONAL RESIDENTIAL DEVELOPMENT TRENDS

- John Burns Research and Consulting estimates the United States has an undersupply of 1.8 million housing units - including single-family, multi-family, and manufactured housing
- Combining undersupply with demographic demand, second-home demand, and replacement housing, it is estimated that the United States will have to construct 18 million housing units to bring demand and supply back into balance from 2024 to 2033
- Opportunities exist to transform real estate sectors adversely impacted by the pandemic (senior living, office, hotels) into affordable housing
- *Single-Family Residential Development Trends*
  - Undersupply of homes has resulted rising prices and massive pressure on affordability
  - Demand for single-family rentals has increased substantially due to lack of affordability
  - Developers are finding it difficult to build smaller homes to achieve lower overall price points because old zoning guidelines that require large lots and low density and/or neighborhood opposition to denser product types
- *Multi-Family Residential Development Trends*
  - Demand is expected to continue to increase due to strong job growth, favorable demographics, immigration, the high cost of homeownership, and lack of single-family inventory
  - The population age 20 to 34, the prime renter age, as well as 65+ is expected to increase through 2030, increasing demand for multi-family units
  - A large gap exists between owning and renting, the cost of owning was 40% higher than renting in early 2024
  - The need for more space for home office leads some renters to move from shared households or away from their parents' home
  - Multi-family development has been slow due to cost of construction financing, the increasing cost of land and materials, the shortage of labor, and the slowing entitlement process in many jurisdictions
  - The record-high rent growth from 2021 to 2022 has flattened out, but apartment demand remains high
  - Property owners face rising expenses in the form of cost of labor, materials, maintenance and insurance (the average expense per unit increased by 27.4% in the four years ending August 2024 according to Yardi Matrix
  - Multi-family development activity is expected to increase as interest rates decline
  - Proposed affordable policy solutions include expanding tax credit programs such as the Low-Income Housing Tax Credit program, directly subsidizing affordable development, creating incentives to preserve existing housing, expanding direct subsidies to renters in Section 8 and housing choice vouchers, providing federal funding for municipalities that increase density, relaxing zoning codes, and streamlining the entitlement process that discourages developers
  - Building more market-rate product is essential to create more lower-cost units through filtering i.e., the process through which older housing stock becomes more affordable without subsidies as newer, more modern housing stock is introduced into the market

Source: Urban Land Institute (ULI) 2025 Emerging Trends in Real Estate
Prepared by: Keyser Marston Associates, Inc.
Filename: i:/County of SD - Expanded TOA_Market Assessment_v2;4/30/2026;mdt

TABLE A-2

OVERVIEW OF RESIDENTIAL DEVELOPMENT TRENDS - SAN DIEGO COUNTY
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

SAN DIEGO COUNTY RESIDENTIAL DEVELOPMENT TRENDS (1)

- Overall, in September 2024, San Diego County home prices were up 6.5% compared to last year, selling for a median price of $945,000
- As of September 2024, the median price per square foot (SF) for a single-family home in San Diego is $702, up 6.3% from last year
- *Detached Single-Family (as of September 2024)*
  - Sales volume: up 12.4% from the prior year
  - Average sales price: $1,393,140
  - Median sales price: $1,050,000
- *Attached (Townhomes, Condominiums) Single-Family (as of September 2024)*
  - Sales volume: down 7.5% from the prior year
  - Average sales price: $779,880
  - Median sales price: $646,000
- *Multi-Family (1st Quarter 2024)*
  - Developers added more than 700 units in each of the past four quarters
  - Suburban projects accounted for roughly 80% of rentals delivered
  - Vacancy is currently at 4.7%
  - The average effective monthly rent is $2,775
  - The Chula Vista-Imperial Beach submarkets indicate the strongest demand, with vacancy rates remaining low as new units are developed
  - Mid-City/National City, La Mesa/Spring Valley, and El Cajon/Santee/Lakeside, three of the county's four most affordable areas, posted the county's lowest vacancy rates in the 1st quarter of 2024

(1) Source: Review of residential market reports, including Redfin, CBRE, Kidder Matthews, and Marcus & Millichap.

TABLE A-3

KEY ASSETS AND CONSTRAINTS
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

North County Metro East	Otay	Sweetwater
I. ASSETS		
• Proximity to major high-quality employment hubs (Sorrento Valley, University City, Torrey Pines/La Jolla) • Access to freeways and transit (I-15, I-5, North County Transit District Sprinter, Rapid Bus Service) • Proximity to growing residential areas, including Downtown Escondido and Rancho Bernardo • Nearby high-quality education (Poway Unified School District) • Existing water, sewer, and electrical infrastructure • High percentage of owner-occupied vs. renter-occupied units • Multi-family land sales per SF in Trade Area are higher than County	• Large parcels of undeveloped land • Access to I-905 and SR 125 freeways • Access to Rapid Bus Service from the Otay Mesa Transit Center • Proximity to U.S.-Mexico Border (Otay Mesa Port of Entry) • Presence of employment hubs (manufacturing, distribution, logistics) • Presence of workforce population due to high commercial activity • Nearby educational facilities (Sweetwater Union High School District, South County Education Center) • Proximity to eastern Chula Vista • Plans for the development of Central and Southwest Village Specific Plans as part of the City of San Diego's Otay Mesa Community Plan • Recent updates to San Diego County's General Plan and Community • High household income in Trade Area ($140,000) when compared to County • High market-rate monthly rents in Trade Area ($3,200) when compared to the County • High percentage of owner-occupied vs. renter-occupied units	• Large parcels of undeveloped land • Near employment centers in Chula Vista and National City • Proximity to freeways and transit (SR 125, SR 54, I-805, MTS bus lines) • Nearby educational facilities (Sweetwater Union High School District) • Proximity to neighborhood amenities • Existing zoning offers opportunities for both single-family homes and higher-density housing, such as townhomes or multifamily units • Existing water, sewer, and electrical infrastructure • High percentage of owner-occupied vs. renter-occupied units • Multi-family land sales per SF in Trade Area are higher than County • Multiple multi-family projects under construction in Trade Area
II. CONSTRAINTS		
• Existing zoning is primarily for low density • Challenging topography; lack of flat vacant land • Proximity to sensitive habitat and fire hazard area • Low household income in Trade Area when compared to County • Low market-rate monthly rents in Trade Area when compared to the County • Limited multi-family projects under construction within Trade Area	• Existing zoning is primarily for low density • Primarily zoned for industrial and commercial; residential uses may be incompatible • Lack of nearby neighborhood amenities (i.e., grocery stores) • Existing protected lands and environmental buffers • Need for infrastructure (water, sewer, electric, road improvements, stormwater management, and fire protection) • Low multi-family land sales per SF in Trade Area when compared to County • Limited multi-family projects under construction within Trade Area	• Challenging topography; lack of flat vacant land • Proximity to open space uses; residential uses may be incompatible • Low household income in Trade Area when compared to County • Low market-rate monthly rents in Trade Area when compared to the County

Prepared by: Keyser Marston Associates, Inc.
Filename: i:/County of SD - Expanded TOA_Market Assessment_v2;4/30/2026;mdt

TABLE A-4

COMPARISON OF DEMOGRAPHIC AND RESIDENTIAL DEVELOPMENT TRENDS
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

	County of San Diego		North County Metro East (1)			Otay (1)			Sweetwater (1)		
I. Demographics											
A. Population	3,299,130		183,954			58,059			480,601		
B. Households	1,176,566		62,149			15,091			143,768		
C. Average Household Size	2.71		2.92			3.46			3.27		
D. Median Household Income	$104,597		$94,839			$139,712			$87,919		
E. Household Income Distribution											
< $75K	36.0%		41.0%			31.2%			42.5%		
$75K - $99K	11.3%		10.9%			9.5%			13.0%		
$100K - $149K	20.0%		18.0%			34.9%			21.5%		
$150K+	32.7%		30.1%			24.4%			23.0%		
Total	100.0%		100.0%			100.0%			100.0%		
II. Residential Development Trends											
		Annual Growth			*Annual Growth*			*Annual Growth*			*Annual Growth*
A. Total Housing Units	Number	*Rate*	Number		*Rate*	Number		*Rate*	Number		*Rate*
2020	1,228,505	---	63,876		---	13,067		---	147,708		---
2024	1,253,008	*0.5%*	64,557		*0.3%*	16,655		*6.3%*	148,976		*0.2%*
2029	1,280,329	*0.4%*	65,675		*0.3%*	17,996		*1.6%*	150,816		*0.2%*
B. Rent vs. Own											
% Owner Occupied Housing Units	53.70%		58.10%			67.00%			53.50%		
% Renter Occupied Housing Units	46.30%		41.90%			33.00%			46.50%		
C. Market-Rate Residential (2)											
Average Effective Monthly Rent	$2,408		$2,199			$3,192			$2,152		
Average Effective Monthly Rent/SF	$2.94		$2.65			$3.01			$2.68		
D. Multi-Family Land Sales (Average $/SF) (2)(3)	$25		$52			$21			$42		
E. Projects Under Construction (2)	48		1			1			7		
Total Number of Units	7,612		420			278			455		
III. Overall Market Potential for Increased Housing Density (4)			Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term
A. Market Potential			Moderate	Strong	Strong	Weak	Weak	Moderate	Moderate	Moderate	Strong

(1) Trade areas reflect a 5-mile radius from the centerpoint of each Transit Opportunity Area (TOA) as follows:
- Otay = 7144 Otay Mesa Road
- Sweetwater = 3724 Valley Vista Way
- North Metro = 3003 Bear Valley Parkway

(2) Source: CoStar Group, Inc.

(3) Reflects sales of land proposed for multi-family/apartments within the past 5 years.

(4) Time periods reflect the following:
Near-Term = 0 to 5 Years
Mid-Term = 5 to 10 Years
Long-Term = 10 to 20 Years

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APPENDIX B

2025
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

TABLE B-1

OVERALL MARKET POTENTIAL FOR INCREASED HOUSING DENSITY
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

	County of San Diego	Alpine/Crest/Dehesa/Jamul	Fallbrook	Lakeside
I. Land Area [1]				
A. Total Acres	2,752,000 acres	98,470 acres	50,240 acres	32,154 acres
B. Square Miles	4,300 sq. miles	154 sq. miles	79 sq. miles	50 sq. miles
C. Trade Area	---	7 miles	5 miles	4 miles
II. Demographics [1]				
A. Population	3,293,400	60,118	52,846	185,143
B. Households	1,184,979	21,227	18,272	64,301
C. Average Household Size	2.75	2.82	2.87	2.82
D. Median Household Income	$108,715	$128,415	$108,237	$88,736
E. Household Income Distribution				
< $75K	33.6%	26.6%	33.1%	42.2%
$75K - $99K	12.1%	10.6%	12.4%	12.7%
$100K - $149K	18.6%	20.0%	19.5%	17.7%
$150K+	35.7%	42.8%	35.0%	27.4%
Total	100.0%	100.0%	100.0%	100.0%
III. Residential Development Trends				
		Annual	Annual	Annual
		Growth	Growth	Growth
A. Total Housing Units [1]	Number	Rate	Number	Rate	Number	Rate	Number	Rate
2020	1,228,505	---	22,134	---	18,330	---	66,131	---
2025	1,263,951	*0.6%*	22,111	*0.0%*	19,235	*1.0%*	66,626	*0.1%*
2030	1,287,419	*0.4%*	22,168	*0.1%*	19,351	*0.1%*	67,068	*0.1%*
B. Rent vs. Own [1]								
% Owner Occupied Housing Units	50.4%		78.0%		68.7%		51.0%	
% Renter Occupied Housing Units	43.9%		18.0%		26.3%		45.5%	
% Vacant Housing Units	5.7%		4.0%		5.0%		3.5%	
C. Single-Family Residential - Median Sales Price [2]	$1,055,000 /Unit [3]		$815,000 /Unit		$725,000 /Unit		$760,000 /Unit	
D. Market-Rate Residential [2]								
Average Effective Monthly Rent	$2,459		$2,099		$1,654		$2,030	
Average Effective Monthly Rent/SF	$2.97		$2.34		$2.08		$2.50	
E. Residential Land Sales (Average $/SF\) [2]	$35 /SF		---		$10 /SF		$39 /SF	
F. Projects Under Construction [2]	45 Projects		0 Projects		0 Projects		1 Project	
Total Number of Units	7,053 Units		0 Units		0 Units		15 Units	
IV. Public Transit and Neighborhood Amenities								
A. Public Transit			Limited		Accessible		Accessible	
B. Neighborhood Amenities			Sparse		Abundant		Abundant	
V. Residential Projects in the Pipeline within Trade Area [4]								
A. Total Number of Units			162 Units		289 Units		279 Units	
B. Number of Projects			18 Projects		8 Projects		17 Projects	
C. Average Density			4.4 Units/Acre		5.4 Units/Acre		9.1 Units/Acre	
VI. Overall Market Potential for Increased Housing Density [5]		Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term
A. Market Potential		Weak	Weak	Moderate	Moderate	Moderate	Strong	Moderate	Strong	Strong

(1) Source: Esri, October 2025.
(2) Source: CoStar, October 2025.
(3) Source: San Diego County Association of Realtors, as of October 2025.
(4) Source: County of San Diego, November 5, 2025. Reflects projects in review, open, or out to applicant.
(5) Time periods reflect the following:
Near-Term = 0 to 5 Years
Mid-Term = 5 to 10 Years
Long-Term = 10 to 20 Years

Prepared by: Keyser Marston Associates, Inc.
Filename: County of SD - Expanded TOA_Market Assessment_v2\4/30/2026; ema

TABLE B-1

OVERALL MARKET POTENTIAL FOR INCREASED HOUSING DENSITY
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

	North County Metro North			Ramona			Spring Valley			Valley Center		
I. Land Area [1]												
A. Total Acres	32,154 acres			18,086 acres			50,240 acres			12,560 acres		
B. Square Miles	50 sq. miles			28 sq. miles			79 sq. miles			20 sq. miles		
C. Trade Area	4 miles			3 miles			5 miles			2.5 miles		
II. Demographics [1]												
A. Population	167,519			19,164			288,199			7,877		
B. Households	57,354			6,452			99,773			2,612		
C. Average Household Size	2.85			2.95			2.85			3.00		
D. Median Household Income	$109,084			$107,812			$90,920			$125,984		
E. Household Income Distribution												
< $75K	33.4%			35.1%			40.5%			26.6%		
$75K - $99K	11.9%			10.7%			13.7%			11.3%		
$100K - $149K	18.6%			19.6%			18.4%			19.5%		
$150K+	36.1%			34.6%			27.4%			42.6%		
Total	100.0%			100.0%			100.0%			100.0%		
III. Residential Development Trends												
			Annual Growth			*Annual Growth*			*Annual Growth*			*Annual Growth*
A. Total Housing Units [1]	Number		*Rate*	Number		*Rate*	Number		*Rate*	Number		*Rate*
2020	58,177		---	6,632		---	102,413		---	2,113		---
2025	60,001		*0.6%*	6,692		*0.2%*	103,491		*0.2%*	2,770		*5.6%*
2030	61,442		*0.5%*	6,731		*0.1%*	104,350		*0.2%*	2,782		*0.1%*
B. Rent vs. Own [1]												
% Owner Occupied Housing Units	57.0%			60.0%			49.8%			81.5%		
% Renter Occupied Housing Units	38.6%			36.4%			46.6%			12.8%		
% Vacant Housing Units	4.4%			3.6%			3.6%			5.7%		
C. Single-Family Residential - Median Sales Price [2]	$995,000 /Unit			$632,500 /Unit			$799,000 /Unit			$852,400 /Unit		
D. Market-Rate Residential [2]												
Average Effective Monthly Rent	$2,501			$1,985			$2,022			---		
Average Effective Monthly Rent/SF	$2.85			$2.21			$2.51			---		
E. Residential Land Sales (Average $/SF\) [2]	$38 /SF			--- /SF			$57 /SF			$18 /SF		
F. Projects Under Construction [2]	1 Project			0 Projects			1 Project			0 Projects		
Total Number of Units	460 Units			0 Units			15 Units			0 Units		
IV. Public Transit and Neighborhood Amenities												
A. Public Transit	Accessible			Limited			Accessible			Accessible		
B. Neighborhood Amenities	Abundant			Abundant			Abundant			Sparse		
V. Residential Projects in the Pipeline within Trade Area [4]												
A. Total Number of Units	537 Units			193 Units			185 Units			1,347 Units		
B. Number of Projects	26 Projects			5 Projects			13 Projects			7 Projects		
C. Average Density	8.7 Units/Acre			5.8 Units/Acre			3.5 Units/Acre			10.8 Units/Acre		
VI. Overall Market Potential for Increased Housing Density [5]	**Near-Term**	**Mid-Term**	**Long-Term**	**Near-Term**	**Mid-Term**	**Long-Term**	**Near-Term**	**Mid-Term**	**Long-Term**	**Near-Term**	**Mid-Term**	**Long-Term**
A. Market Potential	Strong	Strong	Strong	Weak	Moderate	Moderate	Moderate	Moderate	Strong	Moderate	Strong	Strong

(1) Source: Esri, October 2025.
(2) Source: CoStar, October 2025.
(3) Source: San Diego County Association of Realtors, as of October 2025.
(4) Source: County of San Diego, November 5, 2025. Reflects projects in review, op

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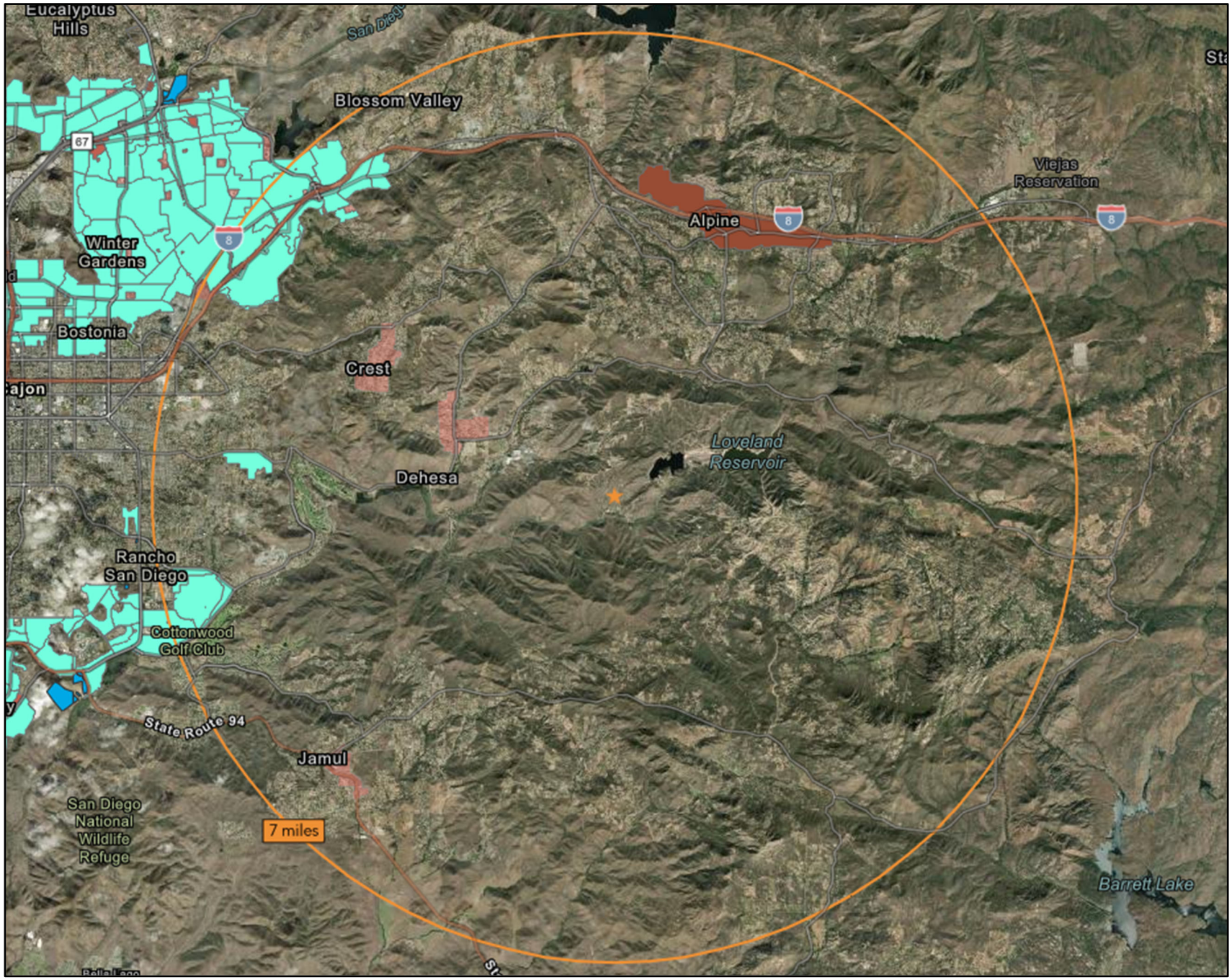
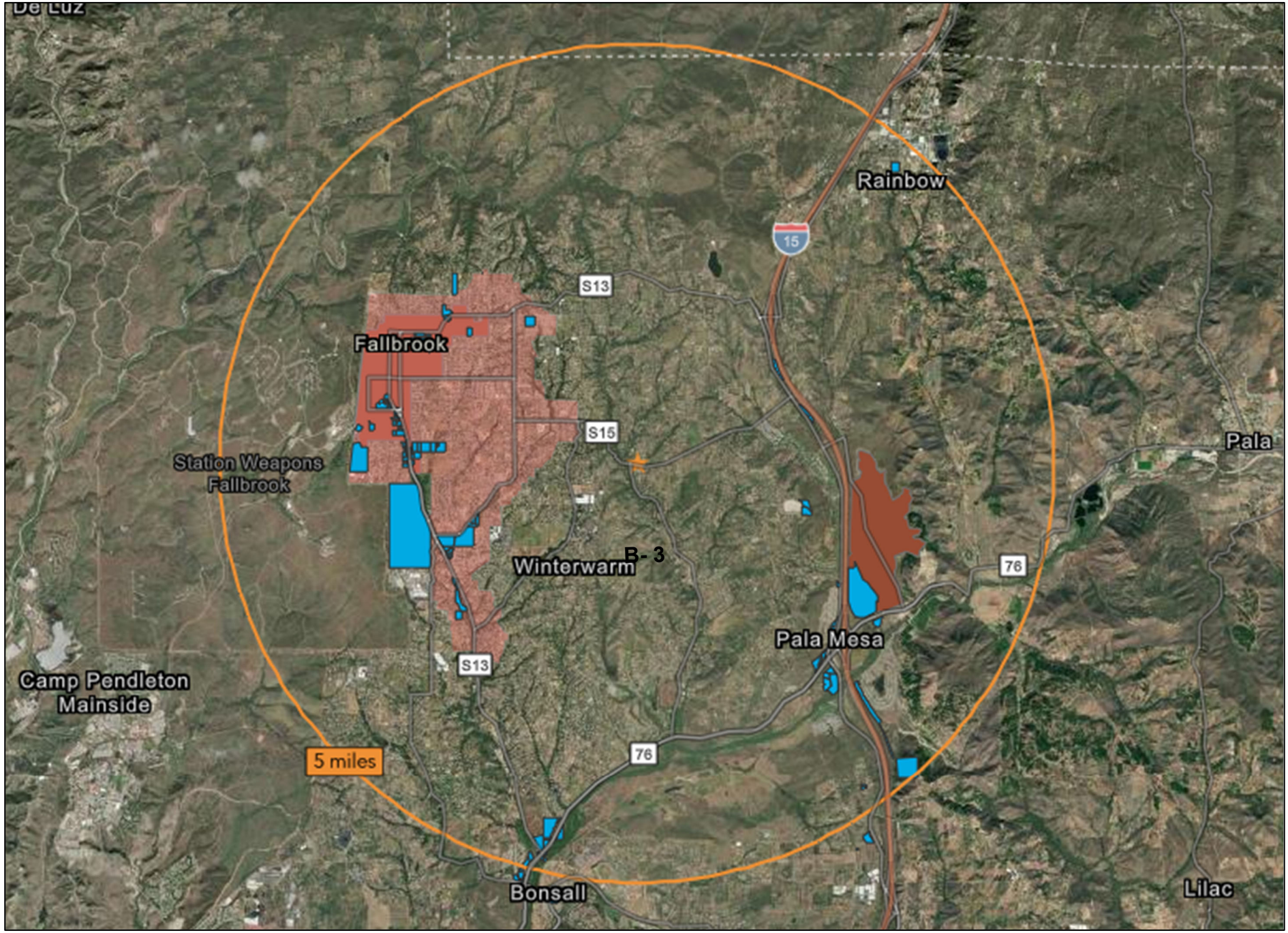
APPENDIX C

MAPS OF TOA TRADE RINGS
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

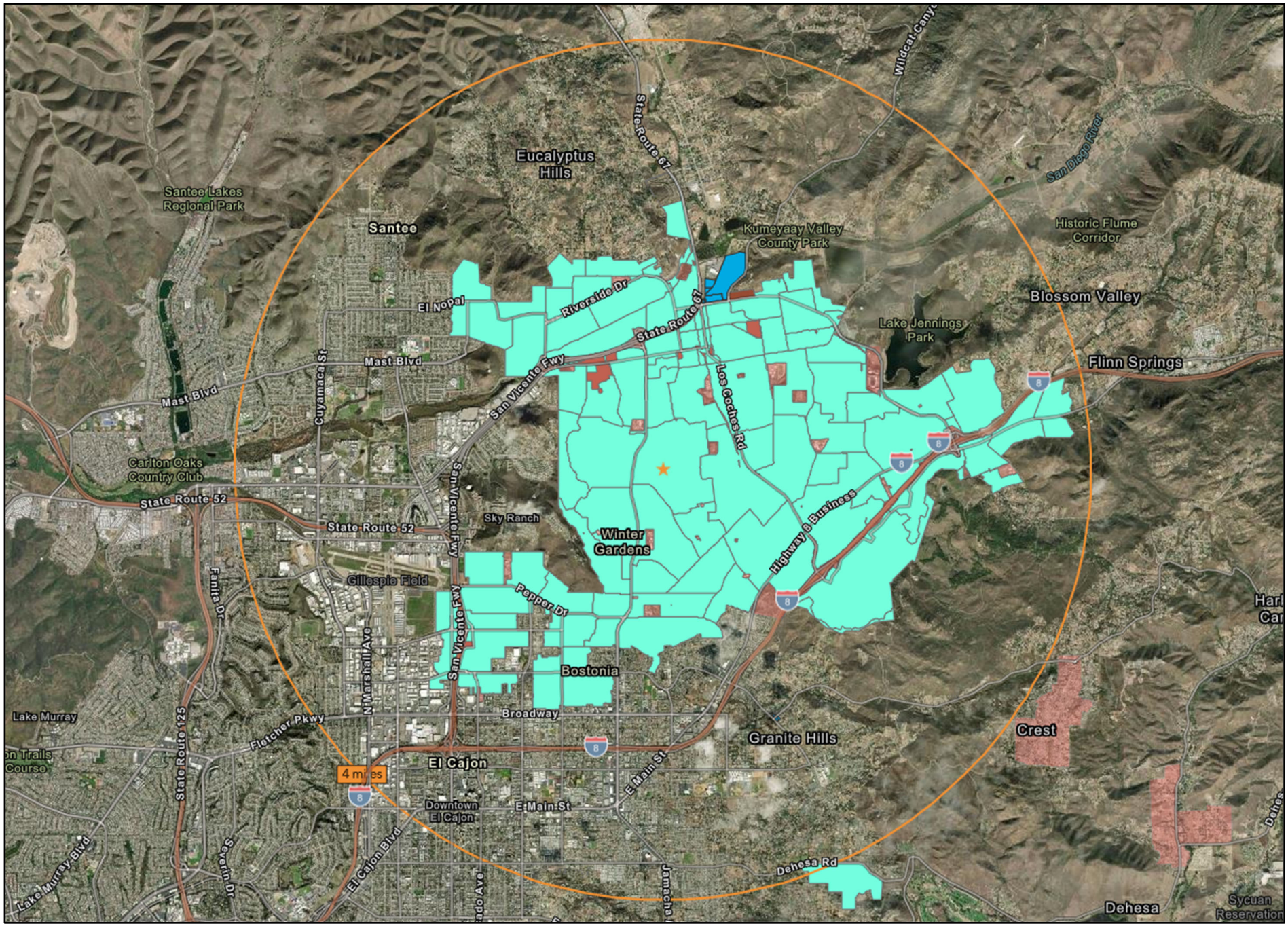
Alpine/Crest/Dehesa/Jamul TOA *(reflects 7-mile trade ring; mid-point: 1949 Sloane Canyon Rd, El Cajon)*



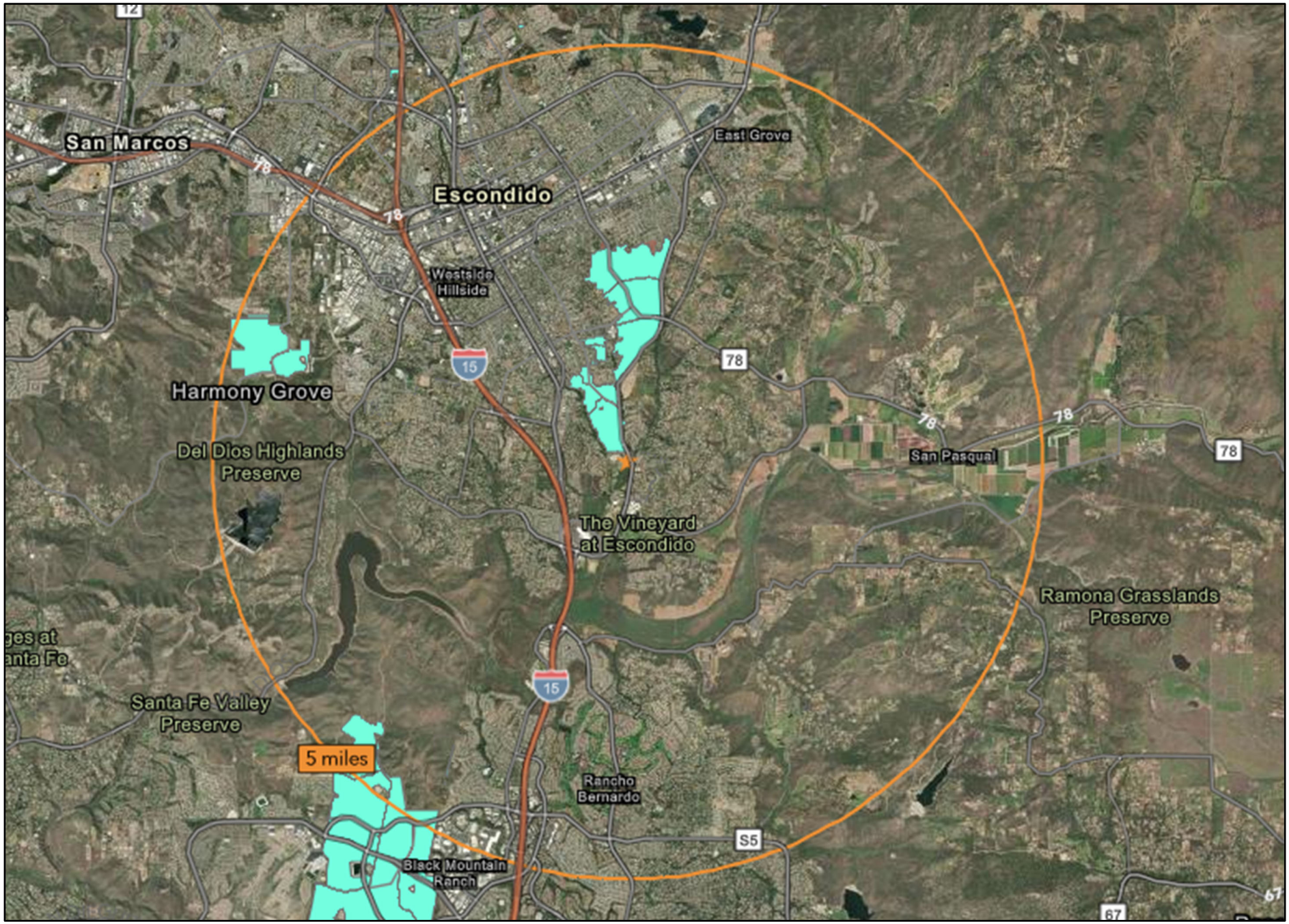
Fallbrook TOA *(reflects 5-mile trade ring; mid-point: 2826 Reche Road, Fallbrook)*



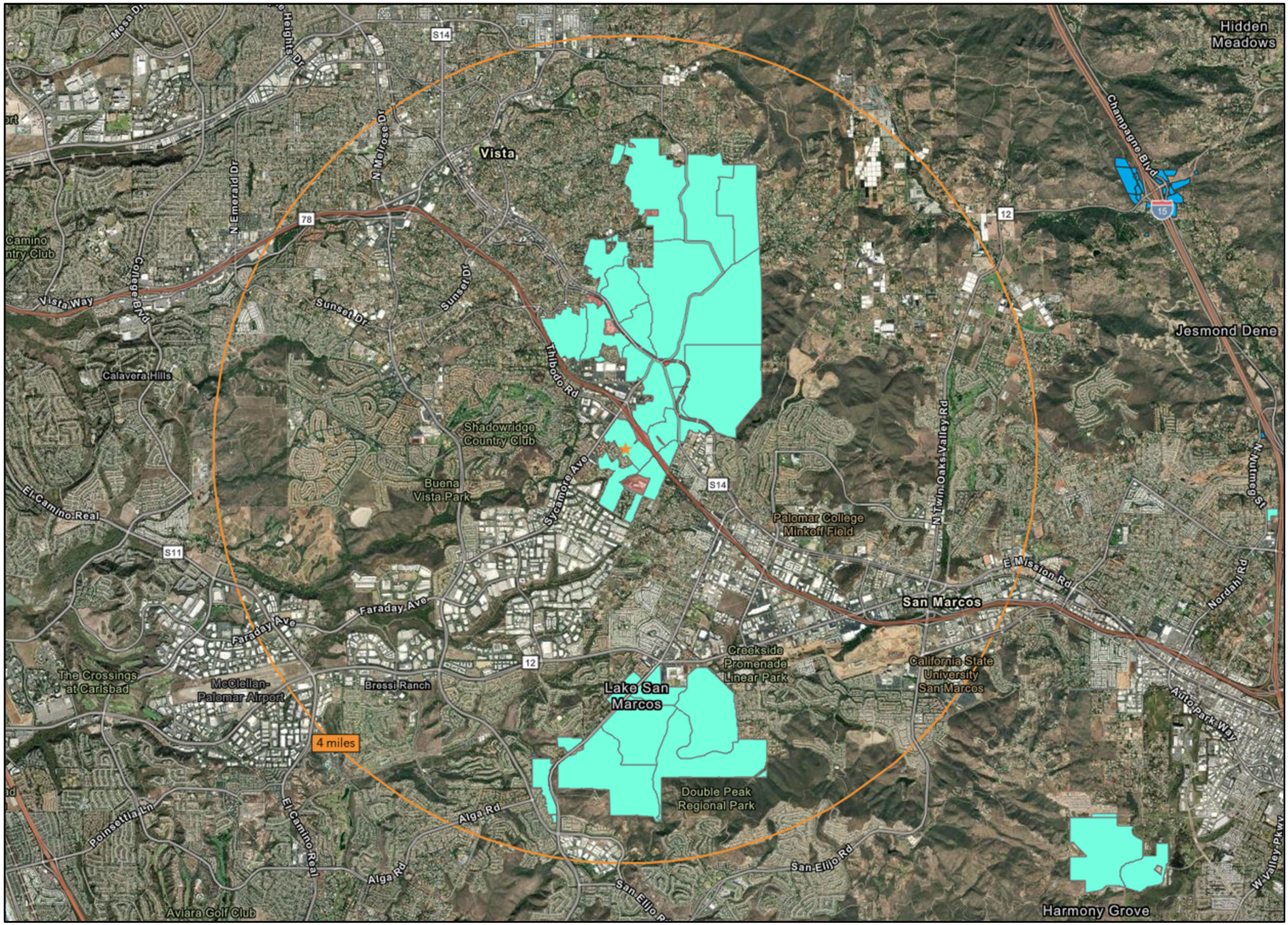
Lakeside TOA *(reflects 4-mile trade ring; mid-point: 9100 Single Oak Drive, Lakeside)*



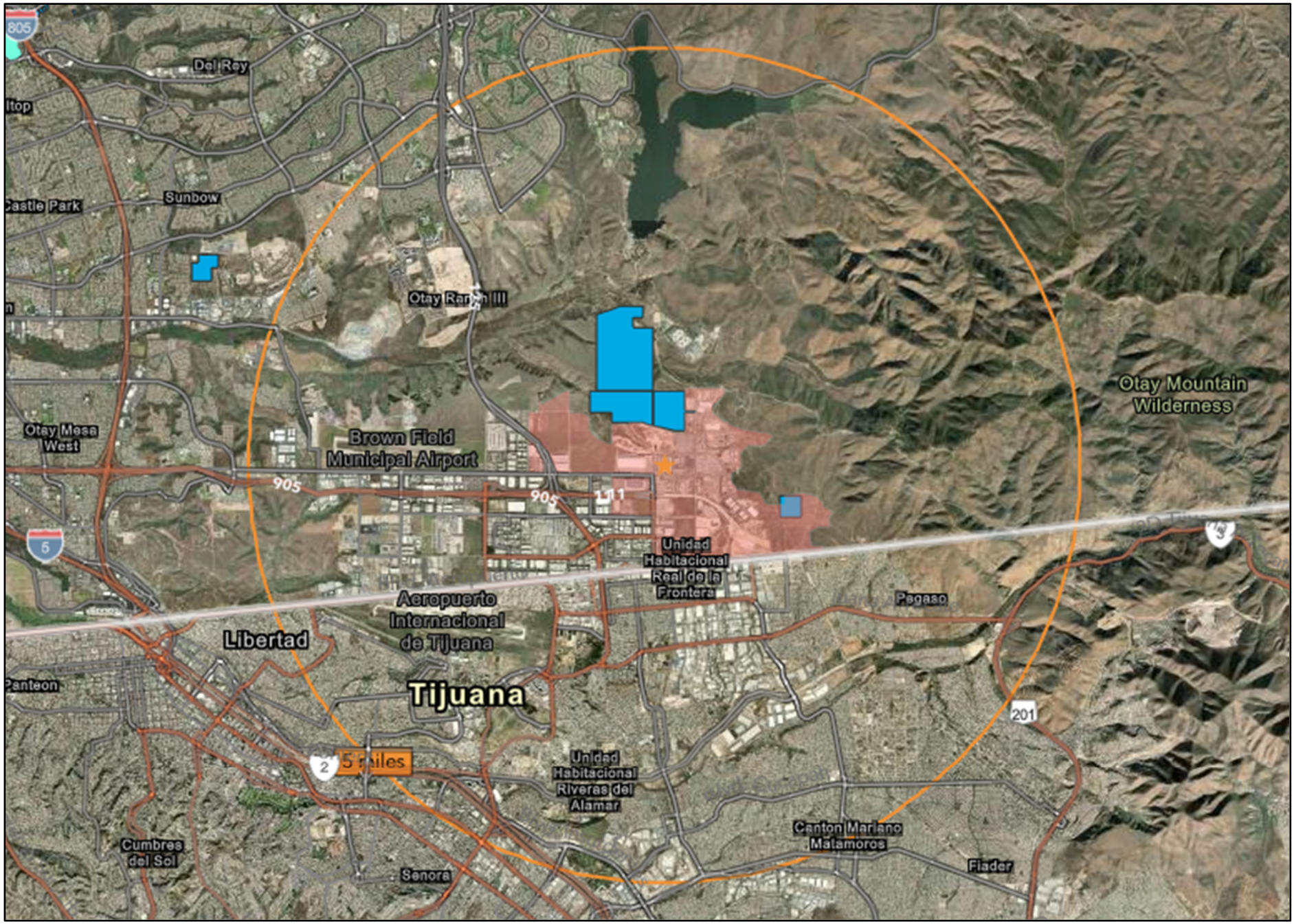
North County Metro East TOA *(reflects 5-mile trade ring; mid-point: 3003 Bear Valley Parkway, Escondido)*



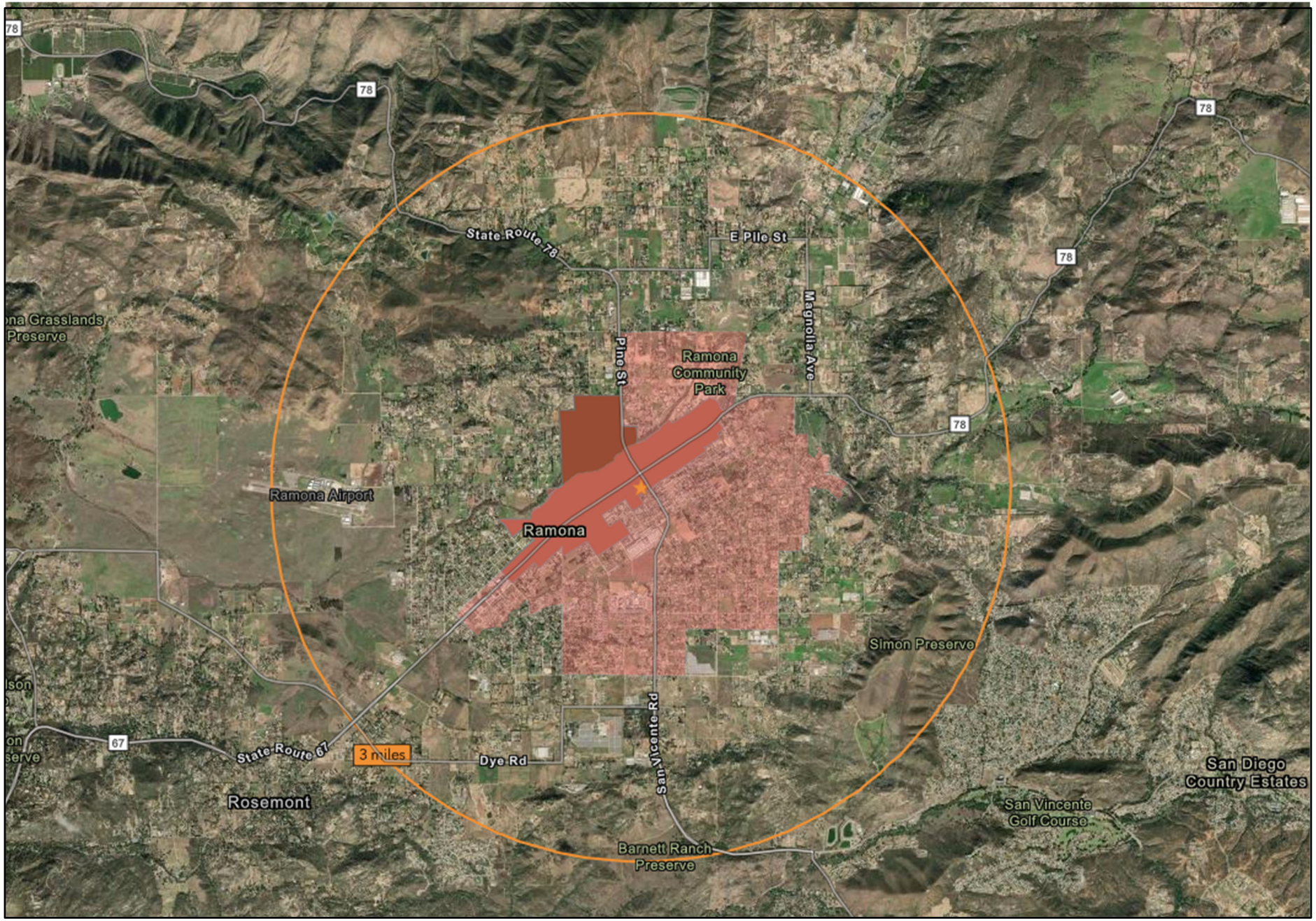
North County Metro North TOA *(reflects 4-mile trade ring; mid-point: 660 Plumosa Avenue, Vista)*



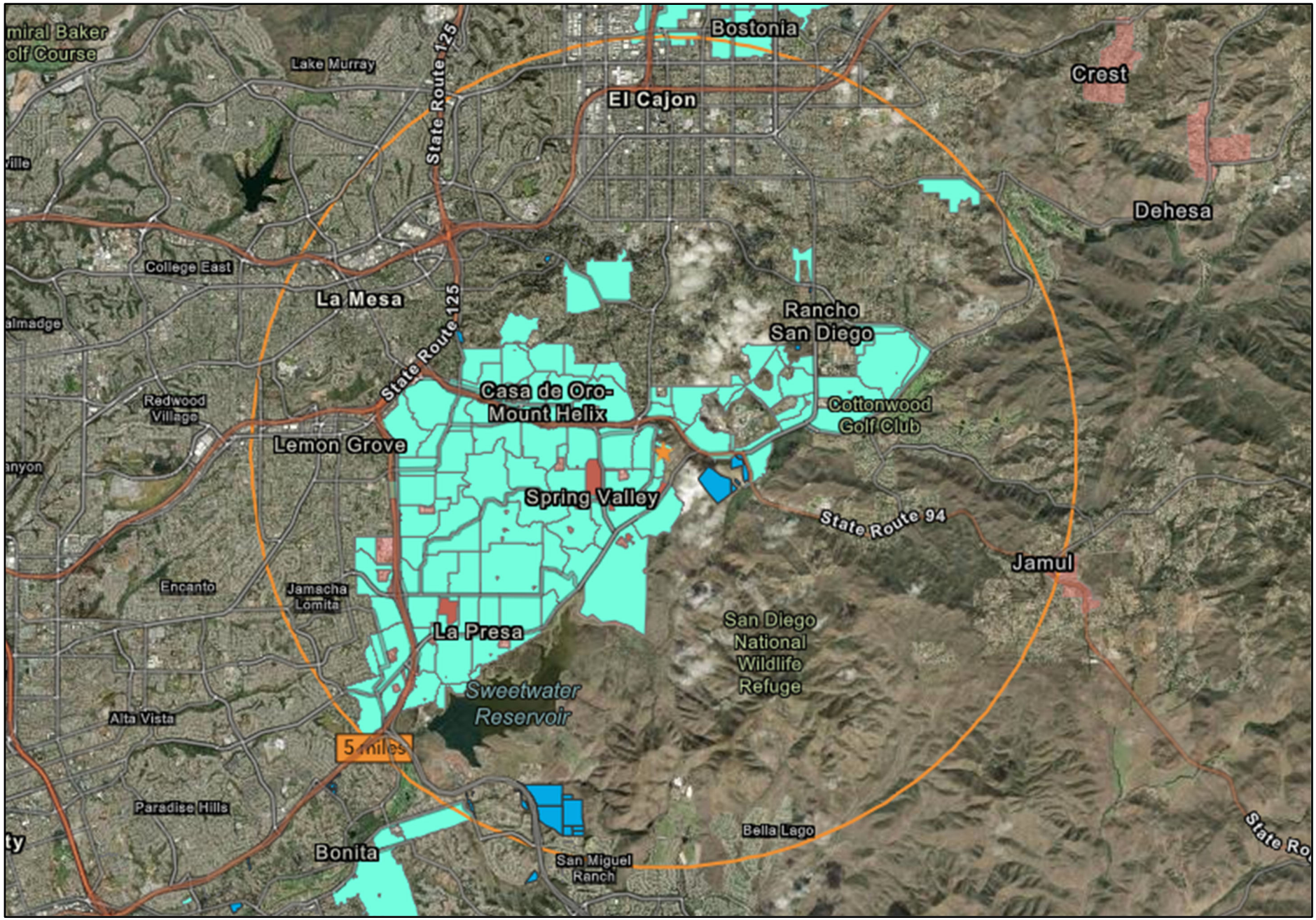
Otay TOA *(reflects 5-mile trade ring; mid-point: 7144 Otay Mesa Rd, San Diego)*



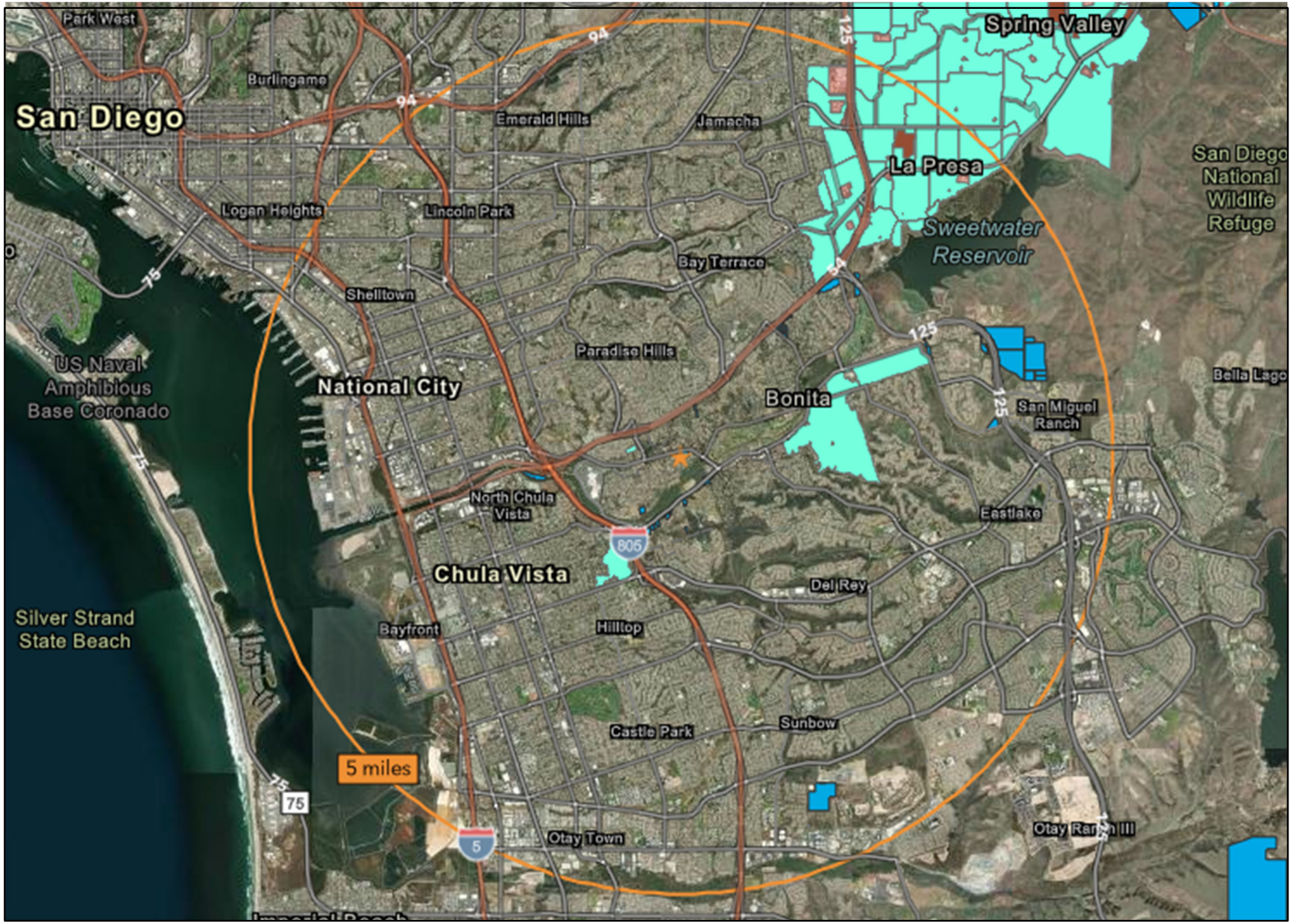
Ramona TOA *(reflects 3-mile trade ring; mid-point: 1024 D Street, Ramona)*



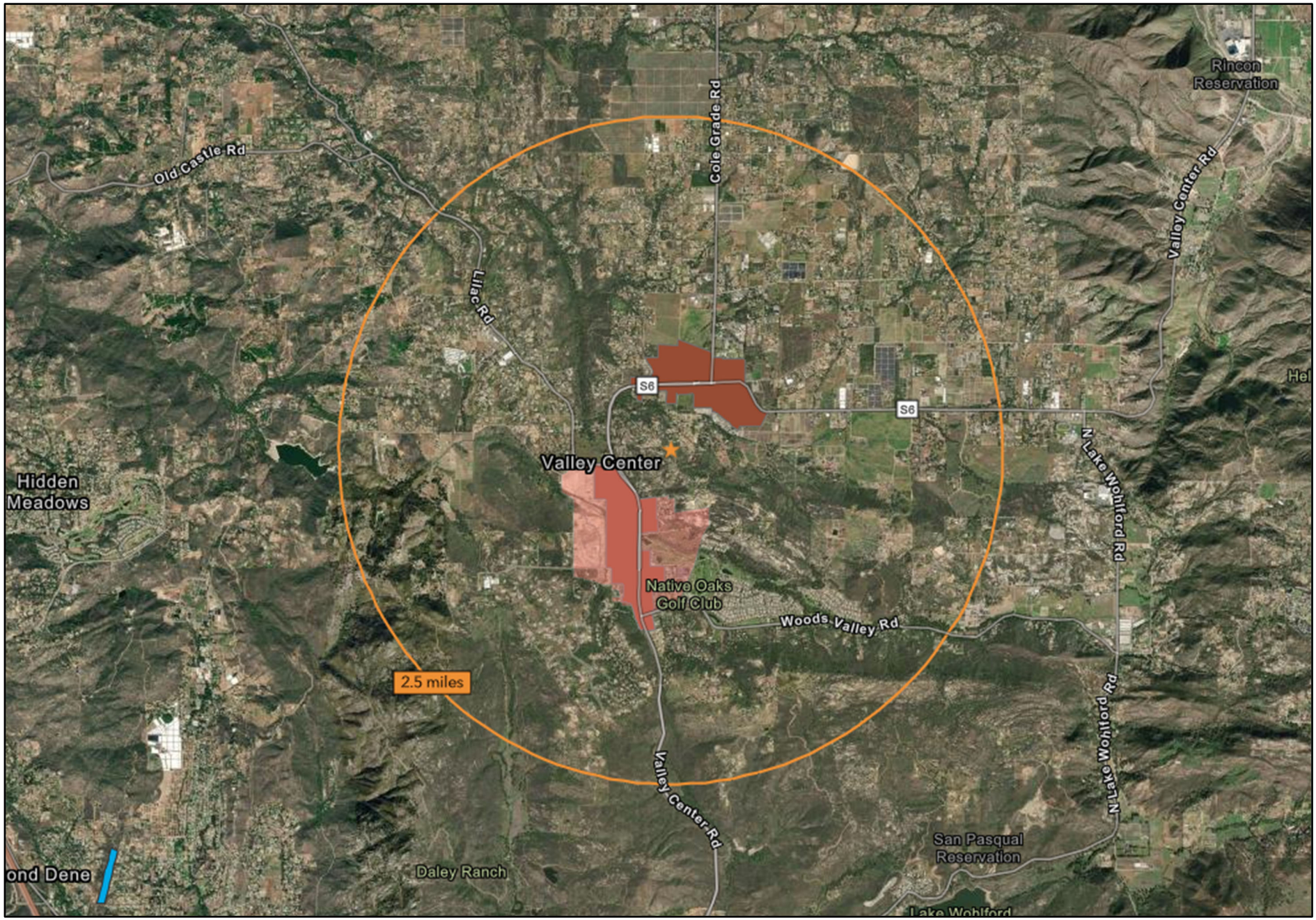
Spring Valley TOA *(reflects 5-mile trade ring; mid-point: 3018 Calle Los Arboles, Spring Valley)*



Sweetwater TOA *(reflects 5-mile trade ring; mid-point: 3724 Valley Vista Way, Bonita)*



Valley Center TOA *(reflects 2.5-mile trade ring; mid-point: 28214 Indian Creek Road, Valley Center)*



KEYSER MARSTON ASSOCIATES

Limiting Conditions

1. KMA has made extensive efforts to confirm the accuracy and timeliness of the information contained in this document. Although KMA believes all information in this document is correct, it does not guarantee the accuracy of such and assumes no responsibility for inaccuracies in the information provided by third parties.
2. The findings are based on economic rather than political considerations. Therefore, they should be construed neither as a representation nor opinion that government approvals for development can be secured. No guarantee is made as to the possible effect on development of current or future Federal, State, or local legislation including environmental or ecological matters.
3. The analysis, opinions, recommendations, and conclusions of this document are KMA's informed judgment based on market and economic conditions as of the date of this report. Due to the volatility of market conditions and complex dynamics influencing the economic conditions of the building and development industry, conclusions and recommended actions contained herein should not be relied upon as sole input for final business decisions regarding current and future development and planning.
4. Development opportunities are assumed to be achievable during the specified time frame. A change in development schedule requires that the conclusions contained herein be reviewed for validity. If an unforeseen change occurs in the local or national economy, the analysis and conclusions contained herein may no longer be valid.
5. Any estimates of development costs, project income, and/or value in this evaluation are based on the best available project-specific data as well as the experiences of similar projects. They are not intended to be predictions of the future for the specific project. No warranty or representation is made that any of these estimates or projections will actually materialize.
6. It has been assumed that the value of the property will not be impacted by the presence of any soils, toxic, or hazardous conditions that require remediation to allow development. Additionally, it is assumed that perceived toxic conditions (if any) on surrounding properties will not affect the value of the property
7. KMA is not advising or recommending any action be taken by the County with respect to any prospective, new, or existing municipal financial products or issuance of municipal securities (including with respect to the structure, timing, terms, and other similar matters concerning such financial products or issues).
8. KMA is not acting as a Municipal Advisor to the County and does not assume any fiduciary duty hereunder, including, without limitation, a fiduciary duty to the County pursuant to Section 15B of the Exchange Act with respect to the services provided hereunder and any information and material contained in KMA’s work product.
9. The County shall discuss any such information and material contained in KMA’s work product with any and all internal and/or external advisors and experts, including its own Municipal Advisors, that it deems appropriate before acting on the information and material.

Appendix C. Financial Feasibility Assessment of Residential Prototypes

Financial Feasibility Assessment of Residential Prototypes

Transit Opportunity Area (TOA) Assessment

County of San Diego

Keyser Marston Associates, Inc.

April 30, 2026

KEYSER MARSTON
ASSOCIATES

I. INTRODUCTION

As part of a Transit Opportunity Area (TOA) assessment planning effort, the County of San Diego (County) requested that Keyser Marston Associates, Inc. (KMA) evaluate the financial viability of increased housing density in select areas within the unincorporated area of the County. This report consolidates the findings of two (2) separate KMA financial feasibility assessments conducted in 2024 and 2025, respectively, to provide a comprehensive evaluation of residential development potential across all studied TOAs.

The 2024 assessment evaluated three (3) community planning areas (CPA): North County Metro East, Sweetwater, and Otay. The 2025 assessment expanded the scope to seven (7) additional areas: Alpine/Crest/Dehesa/Jamul, Fallbrook, Lakeside, North County Metro North, Ramona, Spring Valley, and Valley Center. Together, these two studies provide financial feasibility findings across ten (10) TOAs within the unincorporated County.

In both assessments, the TOA parcels were identified by Intersecting Metrics (IM) based on an index applied to parcels within a half-mile buffer of future transit lines. The parcels were then ranked on a points system to determine which parcels meet the minimum criteria to be considered a TOA parcel candidate. In order to assess whether the County should allow for increased density on select parcels within the TOAs, KMA prepared high-level financial feasibility assessments for a range of rental and for-sale housing product types.

II. METHODOLOGY

Both assessments employ a high-level financial feasibility approach to evaluate the potential for residential development in the selected TOAs, utilizing findings from KMA market assessments prepared to evaluate residential market conditions in each TOA, along with prior KMA financial feasibility analyses in support of other County-focused long-range planning efforts. KMA assessed the financial feasibility of five (5) for-sale product types and four (4) rental product types, as follows:

For-Sale Product Types	Rental Product Types
1) Small Lot Single-Family Detached Homes @ 8 to 10 units per acre	1) Garden Apartments with Surface Parking @ 15 to 20 units per acre
2) Motorcourt Homes with Attached Garages @ 10 to 15 units per acre	2) Garden Apartments with Surface and/or Attached Garages @ 25 to 35 units per acre
3) Townhomes and Attached Garages @ 15 to 20 units per acre	3) Stacked Flats with Tuck-Under Parking @ 40 to 60 units per acre

For-Sale Product Types	Rental Product Types
4) Townhomes and Attached Garages @ 20 to 25 units per acre 5) Stacked Flats with Podium Parking @ 50 to 75 units per acre	4) Stacked Flats with Podium Parking @ 60 to 80 units per acre

The assessment findings are presented in terms of the following metrics: "strong" meaning a product type is projected to generate a positive residual land value; "moderate" meaning a product type is projected to generate a positive residual land value but may fall below the prevailing land values in the current market; and "weak" meaning a product type projected to generate a negative residual land value. The feasibility conclusions are expressed in the near-term (0 to 5 years), mid-term (5 to 10 years), and long-term (10 to 20 years).

III. FINANCIAL FEASIBILITY FINDINGS

KMA's financial feasibility outcomes in the TOAs are presented in Tables 1 (for-sale housing) and 2 (rental housing). It should be noted that KMA has not received nor reviewed information from the County related to building typology for residential projects in the pipeline in the various TOA trade areas. KMA also has not received nor reviewed information from the County related to the availability of water and sewer infrastructure in the various TOAs. As such, we have made reasonable assumptions regarding which TOAs or sub-areas rely primarily on private wells and/or septic systems but have not independently verified these estimates. The following presents a summary of the KMA findings.

Alpine/Crest/Dehesa/Jamul

Within the Alpine/Crest/Dehesa/Jamul TOA, General Plan land use densities widely vary from Semi-Rural Residential (SR-1) to Village Core Mixed-Use, which allows for up to 30 units per acre. New housing development other than in the Alpine/Crest/Dehesa/Jamul TOA is largely infeasible due to its rural geography and limited infrastructure. These rural communities rely on private wells and septic systems designed for low-density, single-family use. High-density housing in rural areas will require substantial infrastructure upgrades to support the increased demand for water, sewer, and stormwater management, which will add extraordinary construction costs possibly resulting in infeasible projects. The lack of public transit and access to high quality employment further limits the practicality of higher-density or multi-family housing, as residents must rely on private vehicles for daily commuting. Combined with dispersed land patterns, these constraints make it challenging to achieve the economies of scale needed for financially viable high-density residential development.

KMA Findings and Recommendations: Alpine/Crest/Dehesa/Jamul	
Findings	• Current allowable densities under the General Plan are sufficient to accommodate for-sale/rental housing typologies at densities significantly higher than what is being built today.
Recommendations	• Do not increase density.

Fallbrook

General Plan land use densities in the Fallbrook TOA range between Semi-Rural Residential (SR-1) to Village Residential (VR-30). Current market factors support ownership housing within small-lot single-family homes, motorcourt homes, and townhome developments. These developments generally yield densities ranging between 8 and 25 units per acre, which are currently allowed under the General Plan.

Garden apartments with surface and/or attached garages are often viable in communities with families, like the Fallbrook TOA, because they provide an affordable, family-friendly housing option that fits within low- to moderate-density communities. Their lower construction and land costs compared to mid-rise developments make rents more attainable for working and lower-income households, especially in suburban or semi-rural areas where land is more available. In the long term, stacked flat rental housing with tuck-under parking could be feasible if key market indicators strengthen; however, KMA does not recommend increasing density up to 60 units per acre at this time.

KMA Findings and Recommendations: Fallbrook	
Findings	• Financially feasible for-sale housing product types over the near-, mid-, and long-term fall within the range of allowable densities, not requiring an increase in allowable density. • Over the mid- to long-term, it is conceivable that three-story rental apartments ranging between 25 and 35 units per acre may be financially feasible.
Recommendations	• Allow for an increase in density of up to 35 units per acre.

Lakeside

General Plan land use densities within the Lakeside TOA range from Semi-Rural Residential (SR-1) to Semi-Rural Residential (SR-4), which allows for large-lot single-family homes or equestrian estates. The General Plan also allows for Village Residential (VR-2) through Village Residential (VR-30). The Lakeside TOA has a semi-rural character with strong quality of life amenities that appeal to family households. Current market sales prices and rents support the cost of low- to medium-density ownership housing (8 to 25 units per acre) and rental garden apartments (15 to 35 units per acre) with surface parking and/or attached garages over the near- to long-term. Future residential development has access to existing infrastructure improvements along main corridors to accommodate single-family, townhome, and

garden-style apartment typologies. In the long-term, stacked flat rental housing with tuck-under parking could be feasible if key market indicators strengthen. Outlying areas of the Lakeside TOA with infrastructure constraints will not benefit from increased density allowances.

KMA Findings and Recommendations: Lakeside	
Findings	• Financially feasible for-sale housing product types over the near-, mid-, and long-term fall within the range of allowable densities, not requiring an increase in allowable density. • Over the long-term, higher-density rental housing ranging between 40 to 60 units per acre with tuck-under parking may be financially feasible.
Recommendations	• Allow for an increase in density of up to 60 units per acre.

North County Metro East

General Plan land use densities within the North County Metro East TOA range from Semi-Rural Residential (SR-1) to Semi-Rural Residential (SR-2), which allows for large-lot single-family homes. The General Plan also allows for Village Residential (VR-2) through Village Residential (VR-24). The North County Metro East TOA is highly desirable for for-sale housing and therefore small lot single-family homes (8 to 10 units per acre), motorcourt homes (10 to 15 units per acre), and townhomes (15 to 25 units per acre) will generate strong positive residual land values in the near- to long-term. Stacked-flat condominiums with structured parking (50 to 75 units per acre) may be financially feasible over the long-term.

Garden apartments (15 to 35) units per acre in the North County Metro East TOA are estimated to generate strong positive residual land values in the near- to long-term. KMA projects that stacked flat apartments with tuck-under parking (40 to 60 units per acre) are anticipated to generate strong positive residual land values in the near-term to long-term. Residual land values for multi-family developments above 60 units per acre are projected to be weak in the near-term, moderate in the mid-term with strong residual land values over the long-term.

For-sale and multi-family housing in the North County Metro East TOA is highly desirable in terms of its location in the region, proximity to employment opportunities and educational facilities, and access to transit options (Interstate 15, Sprinter, and Rapid Bus Service).

KMA Findings and Recommendations: North County Metro East	
Findings	• Low density for-sale housing ranging between 8 and 25 units per acre is financially feasible over the near- to long-term. • Over the long-term, three-story rental apartments ranging between 15 and 35 units per acre are likely to be financially feasible. • Higher-density residential typologies up to 80 units per acre with structured parking are not likely to be financially feasible over the long-term.
Recommendations	• Allow for an increase in density of up to 60 units per acre.

North County Metro North

General Plan land use densities within the North County Metro North TOA range from Semi-Rural Residential (SR-1) to Semi-Rural Residential (SR-10), which allows for small- and large-lot single-family homes. The General Plan also allows for Village Residential (VR-2) through Village Residential (VR-30). With its central location, abundance of community amenities, proximity to employment opportunities and educational facilities, and access to transit options, the North County Metro North TOA is well-positioned to achieve sales prices and rents to support construction costs associated with higher-density development.

KMA Findings and Recommendations: North County Metro – North	
Findings	• Low density for-sale housing ranging between 8 and 25 units per acre is financially feasible over the near- to long-term. • Over the long-term, three-story rental apartments ranging between 15 and 35 units per acre may be financially feasible. • Higher-density residential typologies up to 80 units per acre with structured parking may be financially feasible over the long-term.
Recommendations	• Allow for an increase in density of up to 60 units per acre.

Otay

The General Plan does not allow residential uses within the Otay TOA boundary. As such, a General Plan Amendment would be required to permit residential development. For purposes of this analysis, it is assumed that an amendment could be obtained. Overall, for-sale housing in the Otay TOA will not generate positive residual land values in the near- and mid-term. In the long-term, it is conceivable that small lot single-family homes (10 units per acre) and townhomes (15 to 25 units per acre) can generate moderate financially feasibility outcomes. KMA anticipates that the current or future market cannot support high density for-sale stacked flat condominiums (50 to 75 units per acre or greater) with structured parking within the Otay TOA. To be financially feasible, the stacked flat configuration requires reduced parking ratios (relative to typical for-sale product types) with access to public transit options as

well as a walkable environment, which is not likely viable in the Otay TOA. Therefore, homebuyers seeking this product type are more likely to purchase these units in urban areas within the region.

The KMA assessment concludes that in the near- to long-term, the most feasible product type in the Otay TOA is garden apartments with no structured parking (up to 20 units per acre). As density increases, market rents in the Otay TOA do not support the higher cost of construction and therefore do not generate a positive residual land value. KMA estimates that multi-family housing of up to 35 units per acre is moderate in the mid-to long-term. Residual land values for developments above 40 units per acre are projected to yield negative residual land value outcomes and therefore are considered weak over the long term.

Due to the rural conditions of the Otay TOA, the lack of water, sewer, and other infrastructure will cause developers to incur extraordinary costs to install these improvements that cannot offset the achievable market sales prices or rents.

KMA Findings and Recommendations: Otay	
Findings	• In the near- to long-term, two- to three-story rental apartments with surface parking ranging between 15 and 20 units per acre may be financially feasible. • Garden apartments with surface and/or attached garages ranging between 25 and 35 units per acre may be moderately financially feasible over the mid- to long-term.
Recommendations	• Due to limited demand for housing and the extraordinary infrastructure costs required to support residential development in the Otay TOA, do not increase density allowance at this time.

Ramona

General Plan land use densities within the Ramona TOA range from Semi-Rural Residential (SR-1) to Semi-Rural Residential (SR-4), which allows for large-lot single-family homes or equestrian estates. The General Plan also allows for Village Residential (VR-2) through Village Residential (VR-24). The Ramona TOA offers essential amenities to support residents and future population growth. Current sales prices support the cost of lower-density ownership housing over the near- to long-term.

Rental housing can be challenging under current market conditions; however, rental garden apartments with surface parking and/or attached garages over the long-term is expected to be feasible. Future development opportunities may concentrate along established transit corridors such as State Route 67 and State Route 78. Rental apartments may experience moderate feasibility challenges due to the community's smaller population, lower market rents, and limited demand for higher-density housing.

Therefore, the highest density rental housing is anticipated to be developed within a garden-style configuration.

KMA Findings and Recommendations: Ramona	
Findings	• Low density for-sale housing ranging between 8 and 25 units per acre may be financially feasible over the near- to long-term. • Three-story rental apartments ranging between 15 and 35 units per acre are moderately feasible in the near- to mid-term and strong over the long-term.
Recommendations	• Allow for an increase in density of up to 35 units per acre.

Spring Valley

Within the Spring Valley TOA, General Plan land use densities include Semi-Rural Residential (SR-0.50) and Semi-Rural Residential (SR-1) and Village Residential (VR-24). The Spring Valley TOA is an established community with access to retail shops and services and community amenities appealing to existing residents and future populations. The area is also well connected to regional job centers offering short commutes via State Route 125, Interstate 8, and local arterials. This accessibility is a key draw for homebuyers and renters seeking suburban living within reach of employment hubs. Further, the Spring Valley TOA has access to public water and sewer, electricity, and road networks, which support higher-density and in-fill housing development more readily than rural or semi-rural communities. In the long-term, stacked flat rental housing with tuck-under parking could be feasible if key market indicators strengthen.

KMA Findings and Recommendations: Spring Valley	
Findings	• Low density for-sale housing ranging between 8 and 25 units per acre is financially feasible over the near- to long-term. • Over the long-term, three-story rental apartments ranging between 15 and 35 units per acre are likely to be financially feasible. • Higher-density residential typologies up to 60 units per acre with tuck-under parking are moderately financially feasible over the mid-term and strong over the long-term.
Recommendations	• Allow for an increase in density of up to 60 units per acre.

Sweetwater

General Plan land use densities in the Sweetwater TOA range between Semi-Rural Residential (SR-1) to Village Residential (VR-4.3). KMA finds that small lot single-family homes (8 to 10 units per acre) and motorcourt homes (10 to 15 units per acre) will generate strong positive residual land values in the near- to long-term. It is likely that development of for-sale housing in the Sweetwater TOA will

accelerate in the next 10 to 20 years as the region's southern population continues to grow and the incorporated cities reach buildout, thereby allowing higher-density development, ranging between 15 to 25 units per acre, to be financially feasible.

Garden apartments under ranging between 15 to 35 units per acre in the Sweetwater TOA are estimated to generate strong positive residual land values in the near- to long-term. KMA projects that stacked flat apartments with tuck-under parking (40 to 60 units per acre) are anticipated to generate negative (weak) residual land values in the near-term with strong residual land values in the long-term. Residual land values for multi-family developments above 60 units per acre are projected to be weak in the near-term and moderate over the mid- to long-term.

KMA Findings and Recommendations: Sweetwater	
Findings	• Low density for-sale housing ranging between 8 and 25 units per acre is financially feasible over the near- to long-term. • Townhomes ranging between 15 and 25 units per acre are moderately financially feasible in the near-term and strong over the mid- to long-term. • Over the long-term, three-story rental apartments ranging between 15 and 35 units per acre are likely to be financially feasible. • Higher-density residential typologies up to 60 units per acre with tuck-under parking are moderately financially feasible over the mid-term and strong over the long-term.
Recommendations	• Allow for an increase in density of up to 60 units per acre.

Valley Center

General Plan land use densities within the Valley Center TOA range from Semi-Rural Residential (SR-0.50) to Semi-Rural Residential (SR-4), which allows for large-lot single-family homes or equestrian estates. The General Plan also allows for Village Residential (VR-2) through Village Residential (VR-15). Select properties are also designated as Village Core Mixed-Use, which allows for up to 30 units per acre. The Valley Center TOA has relatively large parcels that can accommodate large single-family homes or small residential subdivisions, which is attractive to developers aiming to create custom homes or low-density housing tracts. Although primarily rural, the Valley Center TOA is within commuting distance of major North County employment centers, making it attractive to households willing to travel for work. Improvements and critical mass of housing units associated with the Park Circle master-planned community will also encourage future development within the Valley Center TOA. Current market sales prices and rents support the cost of ownership housing over the near- to long-term.

Rental housing can be challenging under current market conditions; however, rental garden apartments with surface parking, attached garages, and/or tuck-under over the long-term is expected to be feasible. In the long term, stacked flat rental housing with tuck-under parking could be feasible if key market

indicators strengthen; however, KMA does not recommend increasing density up to 60 units per acre at this time.

KMA Findings and Recommendations: Valley Center	
Findings	• Low density for-sale housing ranging between 8 and 25 units per acre is financially feasible over the near- to long-term. • Townhomes ranging between 15 and 25 units per acre are moderately financially feasible in the near-term and strong over the mid- to long-term. • Over the long-term, three-story rental apartments ranging between 15 and 35 units per acre are likely to be financially feasible. • Higher-density residential typologies up to 60 units per acre with tuck-under parking are moderately financially feasible over the long-term.
Recommendations	• Allow for an increase in density of up to 35 units per acre.

IV. FACTORS AFFECTING DEVELOPMENT OF HOUSING IN THE TOAs

While the financial feasibility findings summarized in Section III demonstrate that several TOAs can support increased residential densities under current and projected market conditions, the pace and scale of new housing development across the unincorporated County will ultimately depend on a range of market, physical, and regulatory factors that extend beyond density allowances alone. The TOAs vary significantly in geography, infrastructure capacity, proximity to employment, and market strength, and these differences materially influence whether higher-density typologies can be delivered on a financially viable basis. Key factors and constraints that inhibit development of higher-density housing in select areas of the TOAs include:

- Distant from high-quality employment
- Long commute times to the region's major job centers with limited transit options
- Need for site assembly, particularly in the Sweetwater TOA
- Infrastructure challenges, including reliance on private wells and septic systems in rural TOA areas such as Alpine/Crest/Dehesa/Jamul and Valley Center
- Dispersed land patterns in rural and semi-rural communities that make it difficult to achieve the economies of scale needed for financially viable high-density residential development
- Competition from the buildout of neighboring communities, particularly in the Otay TOA from eastern Chula Vista and Otay Mesa
- Proximity to existing industrial uses, which can negatively affect achievable market rents and sales values

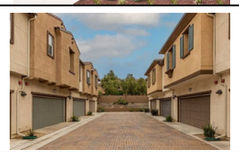
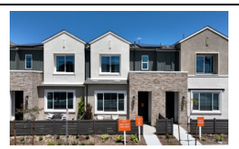
As regional growth occurs, infrastructure investments are made, and transit access improves, product types that are infeasible today may become viable over the mid- to long-term. The County's land use framework should therefore be calibrated not only to present-day market conditions, but also to

anticipate the evolving conditions that will shape residential development in the unincorporated area over the next 10 to 20 years. Examples of factors that could improve feasibility of residential development include:

- Reductions in development costs
- Increases in market rents and sales values
- Implementation of or assistance with infrastructure requirements
- Improvements to public transit
- Upzoning and/or Program Environmental Impact Reports (PEIRs)
- Incentives and efficiencies within the entitlement process

TABLE 1

FINANCIAL FEASIBILITY ASSESSMENT OF FOR-SALE PRODUCT TYPES
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

			Financial Feasibility Assessment - For-Sale [1]																														
			Alpine/Crest/ Dehesa/Jamul			Fallbrook			Lakeside			North County Metro East			North County Metro North			Otay			Ramona			Spring Valley			Sweetwater			Valley Center		
Product Type	Illustrative Example	General Project Description	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term
Small Lot Single-Family Homes Detached		• Type V Construction (wood) • 2 Stories • 8-10 Units/Acre • Average Unit Size of 2,000 SF	Weak	Weak	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Weak	Weak	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong
Motorcourt Homes with Attached Garages		• Type V Construction (wood) • 2 Stories • 10-15 Units/Acre • Average Unit Size of 1,600 SF	Weak	Weak	Moderate	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Weak	Weak	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong
Townhomes with Attached Garages		• Type V Construction (wood) • 2 Stories • 15-20 Units/Acre • Average Unit Size of 1,500 SF	Weak	Weak	Moderate	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Weak	Moderate	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Moderate	Strong	Strong	Moderate	Strong	Strong
Townhomes with Attached Garages		• Type V Construction (wood) • 3 Stories • 20-25 Units/Acre • Average Unit Size of 1,300 SF	Weak	Weak	Moderate	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Weak	Moderate	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Moderate	Strong	Strong	Moderate	Strong	Strong
Stacked Flats with Podium Parking		• Type V Construction (wood) over Type I (concrete) • 4 to 5 Stories • 50-75 Units/Acre • Average Unit Size of 950 SF	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Moderate	Strong	Weak	Moderate	Strong	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Moderate	Weak	Weak	Weak

(1) Assumes availability of vacant development sites. Time periods reflect the following:
Near-Term = 0 to 5 Years
Mid-Term = 5 to 10 Years
Long-Term = 10 to 20 Years

Prepared by: Keyser Marston Associates, Inc.
Filename: County of SD - Expanded TOA_Financial Feasibility Analysis_v2\4/30/2026; ema

TABLE 2

FINANCIAL FEASIBILITY ASSESSMENT OF RENTAL PRODUCT TYPES
TRANSIT OPPORTUNITY AREA ASSESSMENT
COUNTY OF SAN DIEGO

			Financial Feasibility Assessment - Rental [1]																														
			Alpine/Crest/ Dehesa/Jamul			Fallbrook			Lakeside			North County Metro East			North County Metro North			Otay			Ramona			Spring Valley			Sweetwater			Valley Center		
Product Type	Illustrative Example	General Project Description	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	Near-Term	Mid-Term	Long-Term	
Garden Apartments with Surface Parking		• Type V Construction (wood) • 2 to 3 Stories • 15-20 Units/Acre • Average Unit Size of 950 SF	Weak	Weak	Moderate	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Moderate	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	
Garden Apartments with Surface and/or Attached Garages		• Type V Construction (wood) • 3 Stories • 25-35 Units/Acre • Average Unit Size of 900 SF	Weak	Weak	Moderate	Moderate	Strong	Strong	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Weak	Moderate	Moderate	Moderate	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	
Stacked Flats with Tuck-Under Parking		• Type V Construction (wood) • 3 to 4 Stories • 40-60 Units/Acre • Average Unit Size of 850 SF	Weak	Weak	Weak	Weak	Weak	Moderate	Weak	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Moderate	Strong	Weak	Moderate	Strong	Weak	Weak	Moderate	
Stacked Flats with Podium Parking		• Type V Construction (wood) over Type I (concrete) • 4 to 5 Stories • 60-80 Units/Acre • Average Unit Size of 750 SF	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Moderate	Strong	Weak	Moderate	Strong	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Weak	Moderate	Moderate	Weak	Weak	Weak	

(1) Assumes availability of vacant development sites. Time periods reflect the following:
Near-Term = 0 to 5 Years
Mid-Term = 5 to 10 Years
Long-Term = 10 to 20 Years

Prepared by: Keyser Marston Associates, Inc.
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KEYSER MARSTON ASSOCIATES

Limiting Conditions

1. KMA has made extensive efforts to confirm the accuracy and timeliness of the information contained in this document. Although KMA believes all information in this document is correct, it does not guarantee the accuracy of such and assumes no responsibility for inaccuracies in the information provided by third parties.
2. The findings are based on economic rather than political considerations. Therefore, they should be construed neither as a representation nor opinion that government approvals for development can be secured. No guarantee is made as to the possible effect on development of current or future Federal, State, or local legislation including environmental or ecological matters.
3. The analysis, opinions, recommendations, and conclusions of this document are KMA's informed judgment based on market and economic conditions as of the date of this report. Due to the volatility of market conditions and complex dynamics influencing the economic conditions of the building and development industry, conclusions and recommended actions contained herein should not be relied upon as sole input for final business decisions regarding current and future development and planning.
4. Development opportunities are assumed to be achievable during the specified time frame. A change in development schedule requires that the conclusions contained herein be reviewed for validity. If an unforeseen change occurs in the local or national economy, the analysis and conclusions contained herein may no longer be valid.
5. Any estimates of development costs, project income, and/or value in this evaluation are based on the best available project-specific data as well as the experiences of similar projects. They are not intended to be predictions of the future for the specific project. No warranty or representation is made that any of these estimates or projections will actually materialize.
6. It has been assumed that the value of the property will not be impacted by the presence of any soils, toxic, or hazardous conditions that require remediation to allow development. Additionally, it is assumed that perceived toxic conditions (if any) on surrounding properties will not affect the value of the property
7. KMA is not advising or recommending any action be taken by the County with respect to any prospective, new, or existing municipal financial products or issuance of municipal securities (including with respect to the structure, timing, terms, and other similar matters concerning such financial products or issues).
8. KMA is not acting as a Municipal Advisor to the County and does not assume any fiduciary duty hereunder, including, without limitation, a fiduciary duty to the County pursuant to Section 15B of the Exchange Act with respect to the services provided hereunder and any information and material contained in KMA’s work product.
9. The County shall discuss any such information and material contained in KMA’s work product with any and all internal and/or external advisors and experts, including its own Municipal Advisors, that it deems appropriate before acting on the information and material.

Appendix D. Land Use Analysis

I. INTRODUCTION

As part of a Transit Opportunity Area (TOA) assessment Phase 1, TOA parcels were identified by Intersecting Metrics (IM) based on an index that was applied to parcels within a one-half-mile buffer of future transit lines. The parcels were then ranked on a points system to determine which parcels meet the minimum criteria to be considered a TOA parcel candidate.

For Phase 2 of the assessment, the County of San Diego (County) has requested that MIG, Inc. analyze the existing land use of a collection of parcels in ten (10) select areas in the unincorporated area of the County based on different criteria, further explained in **III. Parcel Selection**. Julian was initially part of an area that was analyzed but later removed from the analysis. The selected areas as a result from those parameters are:

- Alpine/Crest/Dehesa/Jamul
- Fallbrook
- Lakeside
- Ramona
- Spring Valley
- Valley Center
- North County Metro North
- North County Metro East
- Otay
- Sweetwater

II. APPROACH TO LAND USE ANALYSIS

This land use analysis was conducted using geospatial and policy data, knowledge of area-specific and neighborhood-specific characteristics, long-range planning goals, and best practices for built environment design. The following approaches influenced how current land use was reviewed:

Sufficient Zoning
Does the current General Plan Land Use allocate sufficient density for the parcel, regardless of existing structure or density?

Location and Potential
Is the parcel located in a retail corridor, on a neighborhood edge, or in a suitable location for density increase?

Parcel Characteristics
Could the parcel support density given parcel size, slope, current use, building-to-land value ratio (BLV), and current structures?

Land Use Adjacencies
- What land uses predominate on surrounding parcels?
- Do other multifamily developments exist nearby?

Environment and Access
- Does the area skew more urban or more rural? Would housing density be appropriate?
- Is there sufficient road access?

Area Characteristics
- Does the area's character support housing density?
- How would a change in land use affect this character?

III. PARCEL SELECTION

Phase 1: To identify specific parcels for land use zoning and density review, the TOA boundaries with the zoning and TOA index score was used (provided by IM). The County's General Plan layer from SanGIS was joined with the parcels to identify the General Plan's land use for the parcels within the TOA boundaries. Building-to-land value was also analyzed using SanGIS parcel information and dividing assessed improvements by assessed land value.

In addition, parcels under the general plan's general commercial, public/semi-public facilities, office professional, and neighborhood commercial parcels were added to the phase 1 analysis.

Phase 2: Phase 2 of the TOA analysis expanded the area based on the following boundaries:

1. Village Areas (under 35 mile/person)
2. Smart Growth Areas
3. Infill Areas

Approximately 58,000 parcels were included within the community area boundaries listed above. From the 58,000 parcels, several filters were applied to identify which parcels would be considered for a parcel-by-parcel analysis:

1. Remove parcels that have already been identified and not considered for land use zoning and density review.
2. Remove parcels that have a General Plan land use designation of open space, industrial, specific plan, or public agency lands.
3. Remove parcels that are analyzed through the County's prior Development Feasibility Analysis (DFA) study.

Approximately 36,000 parcels remained after these filters were applied. A high-level analysis was conducted to filter remaining parcels that met certain criteria:

1. If the General Plan land use designation is already VR-30 or VCMU, then the parcel was not included due to sufficient zoning already in place.
2. If the BLV is greater than 1, then the parcel would not be included due to a high BLV (that is, having highly unlikely redevelopment potential due to existing improvement/investments).

Approximately 12,000 parcels remained for visual analysis for Phase 2.

AB 130 Areas

An additional review of AB 130[1] parcels was undertaken based on County direction. An initial filtering removed any parcels with these land use conditions: within a specific plan, public agency lands, and conservation land. Visual analysis of the remaining AB 130 parcels yielded 0 parcels identified for land use zoning change or density increase. The main reasons for omission were the parcels' rural nature, lack of infrastructure, and access challenges due to terrain.

[1] AB 130, passed into law on June 30, 2025, contains many provisions, including establishing a CEQA statutory exemption for qualifying housing development projects.

IV. DENSITY REVIEW METHODOLOGY

Throughout both assessment phases of the analysis, multiple working sessions were held to identify areas for land use zoning and density review. Three categories were created to identify whether new land use and density should be considered:

1. Include
2. Reason (if not included)
3. Recommendation (if included)

"Include" is broken down into:

- *Yes* – include the following parcel for land use change and/or density increase
- *No* – this parcel does is not included for land use change and/or density increase

Reasons were given for parcels that are considered a *no* in the "include" column, including:

- *Village Area/Planned Area/Specific Plan* – this parcel is already a part of an existing village area or a planned area. Development is already taking place (this only applied to parcels analyzed in Phase 1)
- *Sufficient Zoning* – Parcels with land use designations already at a high density or where the density matches the character of the surrounding neighborhood
- *High BLV* – Parcels with a BLV higher than 1
- *Built out* – Parcels already built out
- *Access* – Limited site access
- *Retain Surroundings* – The parcel is part of an area that has a well-established character
- *Active Agriculture* – The parcel has a current agricultural use
- *Public* – The parcel has a current public use

V. DRAFT FINDINGS

Phase 1 identified 77 parcels for potential land use zone change or density increase. Phase 2 identified 220 parcels, for a total of 297 identified parcels.

The following areas were identified with the top potential:

1. Valley Center – **81 parcels (Phase 2)**
2. North County Metro East (sub-map 1) – **39 parcels (Phase 2) + 13 parcels (Phase 1)**
3. Ramona – **36 parcels (Phase 2)**
4. Lakeside – **30 parcels (Phase 2)**
5. Fallbrook – **7 parcels (Phase 2) + 22 parcels (Phase 1)**
6. Spring Valley – **10 parcels (Phase 2) + 6 parcels (Phase 1)**
7. Sweetwater – **2 parcels (Phase 2) + 33 parcels (Phase 1)**
8. Alpine – **15 parcels (Phase 2)**

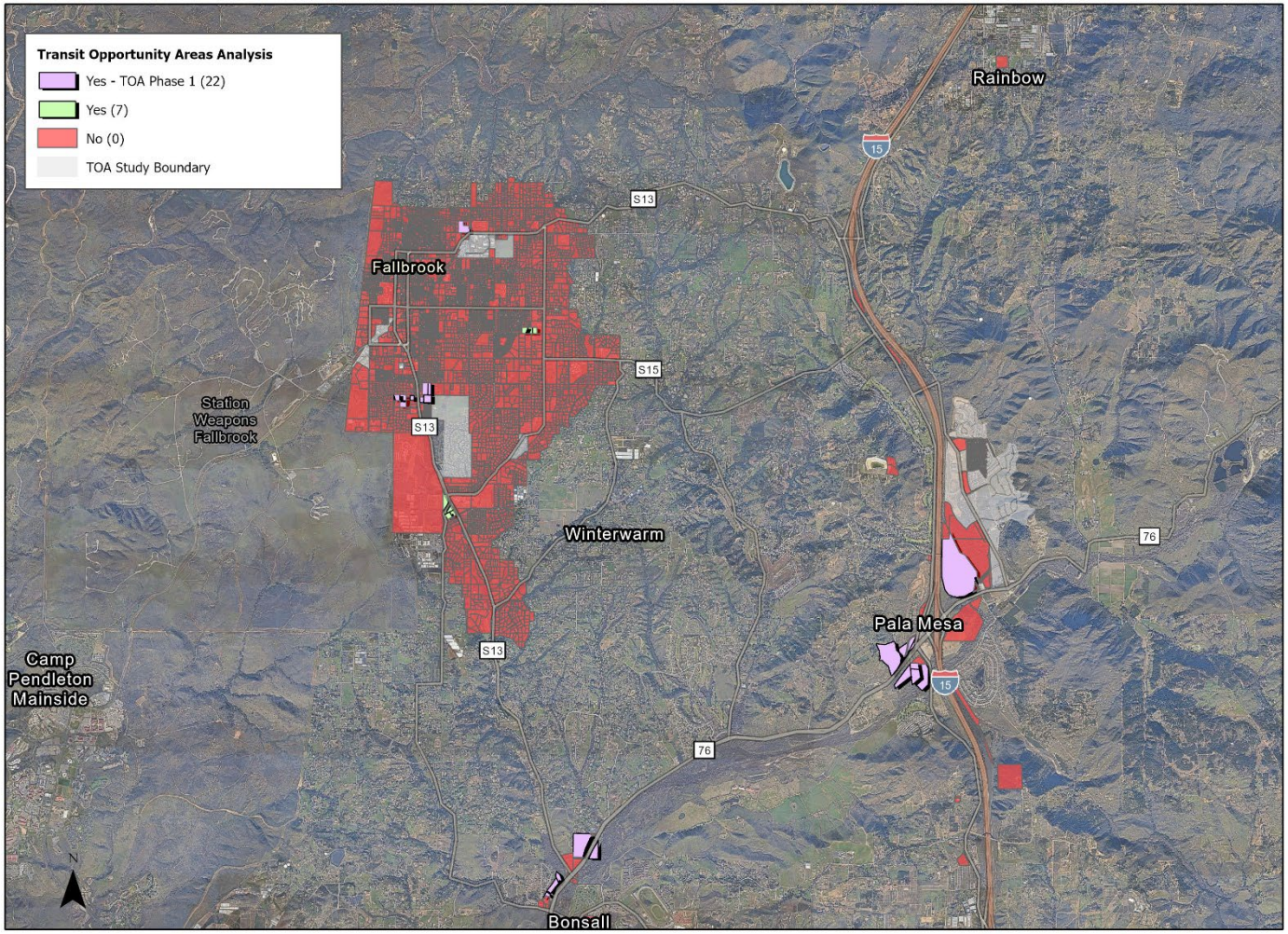
The following areas have the least amount of identified potential:

1. North County Metro East (sub-map 2) – **2 parcels (Phase 1)**
2. North County Metro North - **1 parcels (Phase 1)**
3. Otay – **none identified**
4. Crest, Dehesa, Jamul – **none identified**

Figure 1 - Fallbrook

Identified Parcels:
A total of 29 parcels were identified in the Fallbrook Area for land use zone change or density increase.

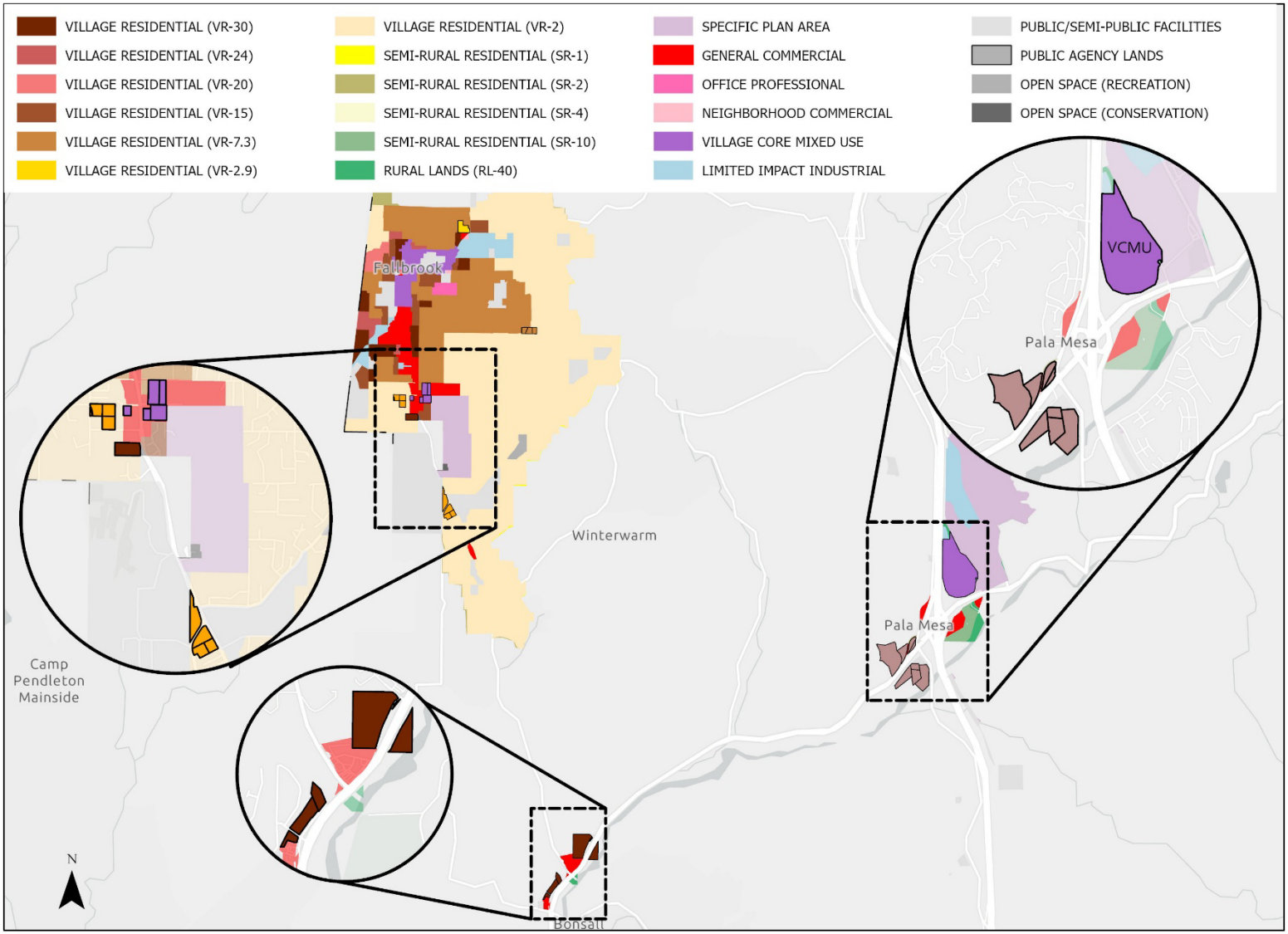
Alignment with the Financial Feasibility Assessment:
Outcomes between the analyses align.



County of San Diego Residential Density Analysis

Fallbrook Area

Figure 2 – Fallbrook Densities



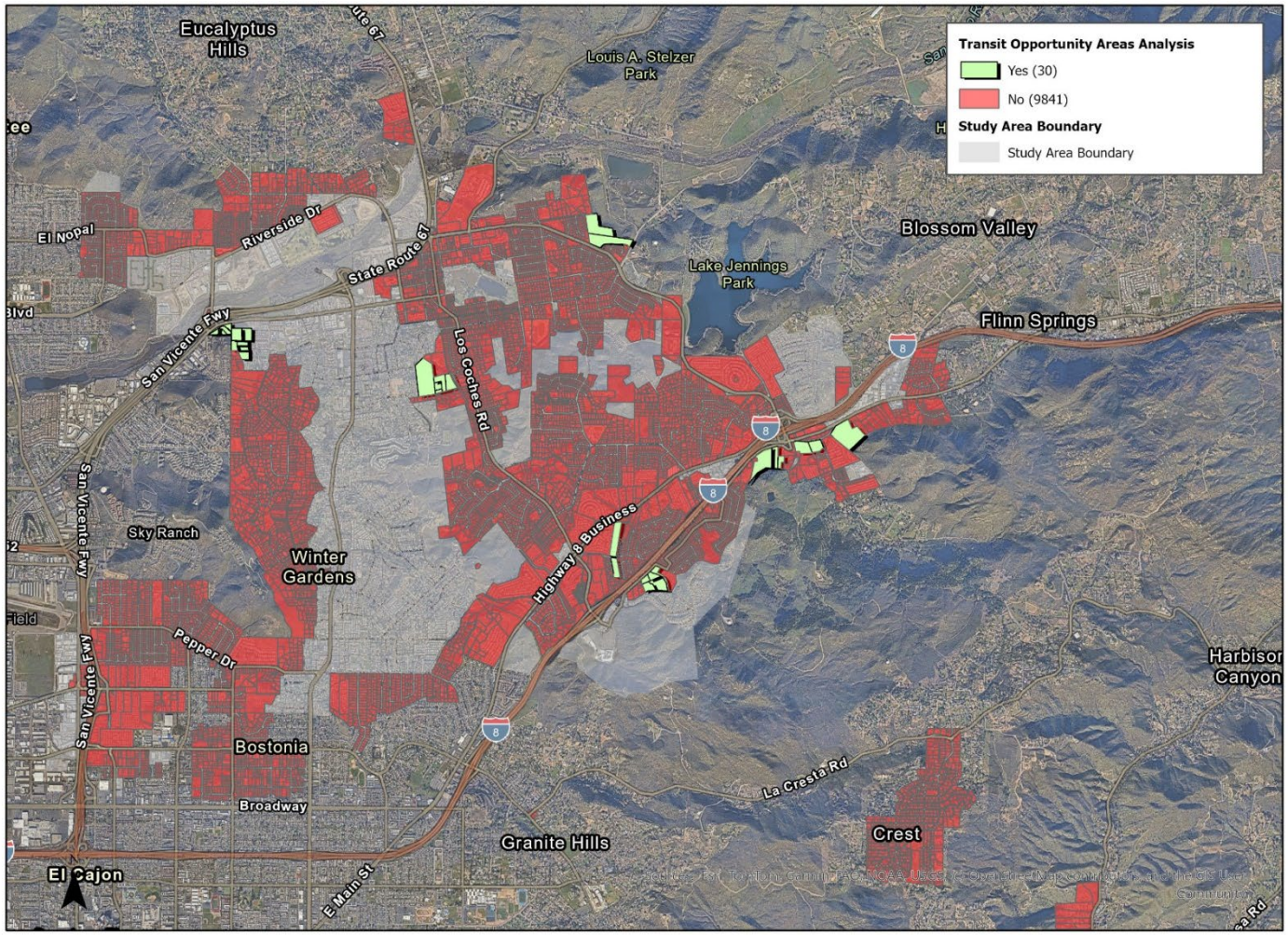
County of San Diego Residential Density Analysis

Fallbrook Area

Figure 3 - Lakeside

Identified Parcels:
A total of 30 parcels were identified in the Lakeside Area for land use zone change or density increase.

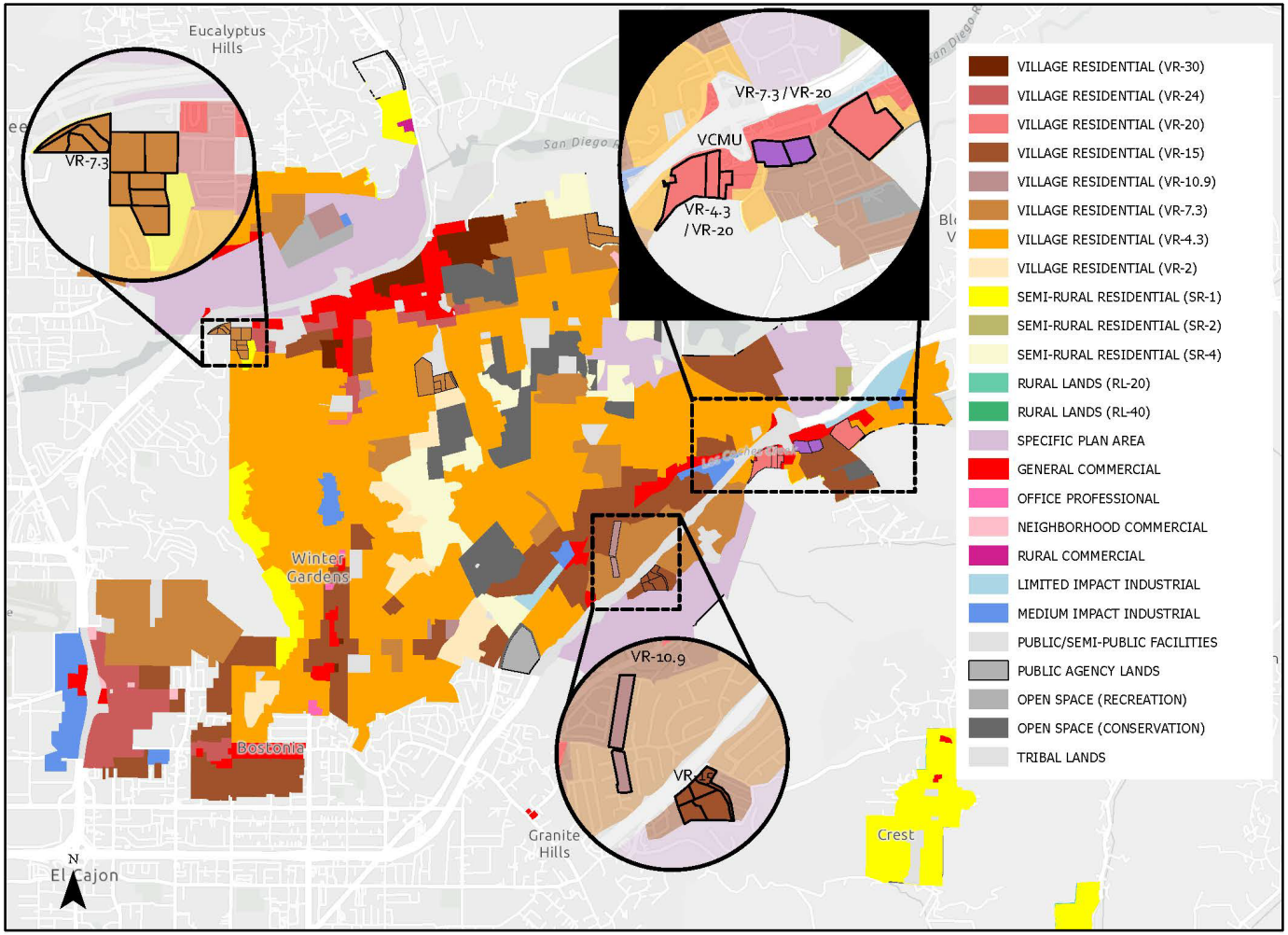
Alignment with the Financial Feasibility Assessment:
The Financial Feasibility Assessment recommends a density up to 60 units per acre along major corridors. Parcels identified for land use zoning change in this area therefore suggest a range of densities for consideration.



County of San Diego Residential Density Analysis

Lakeside Area

Figure 4 – Lakeside Densities



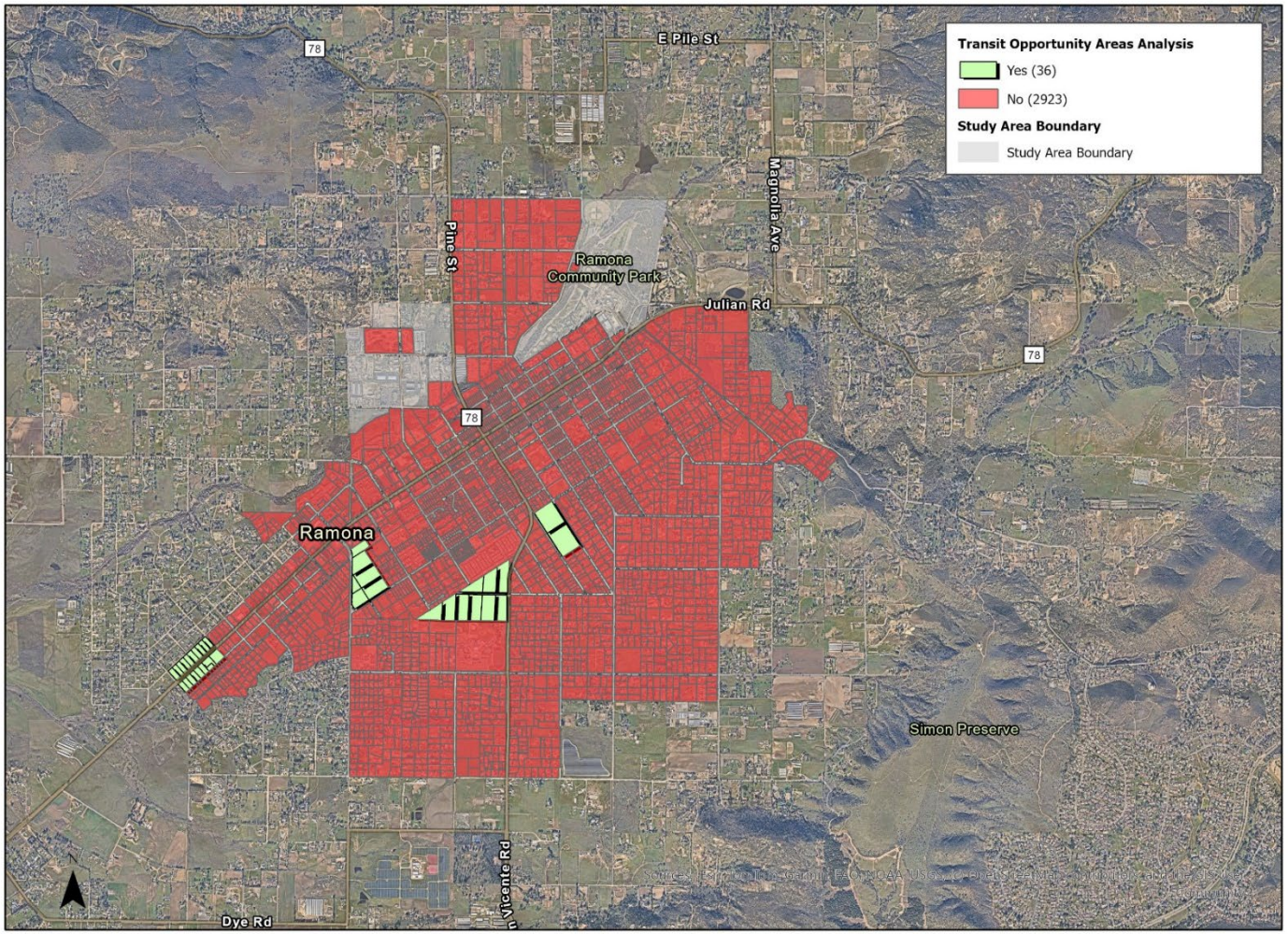
County of San Diego Residential Density Analysis

Lakeside Area

Figure 5 - Ramona

Identified Parcels:
A total of 36 parcels were identified in the Ramona Area for land use zone change or density increase.

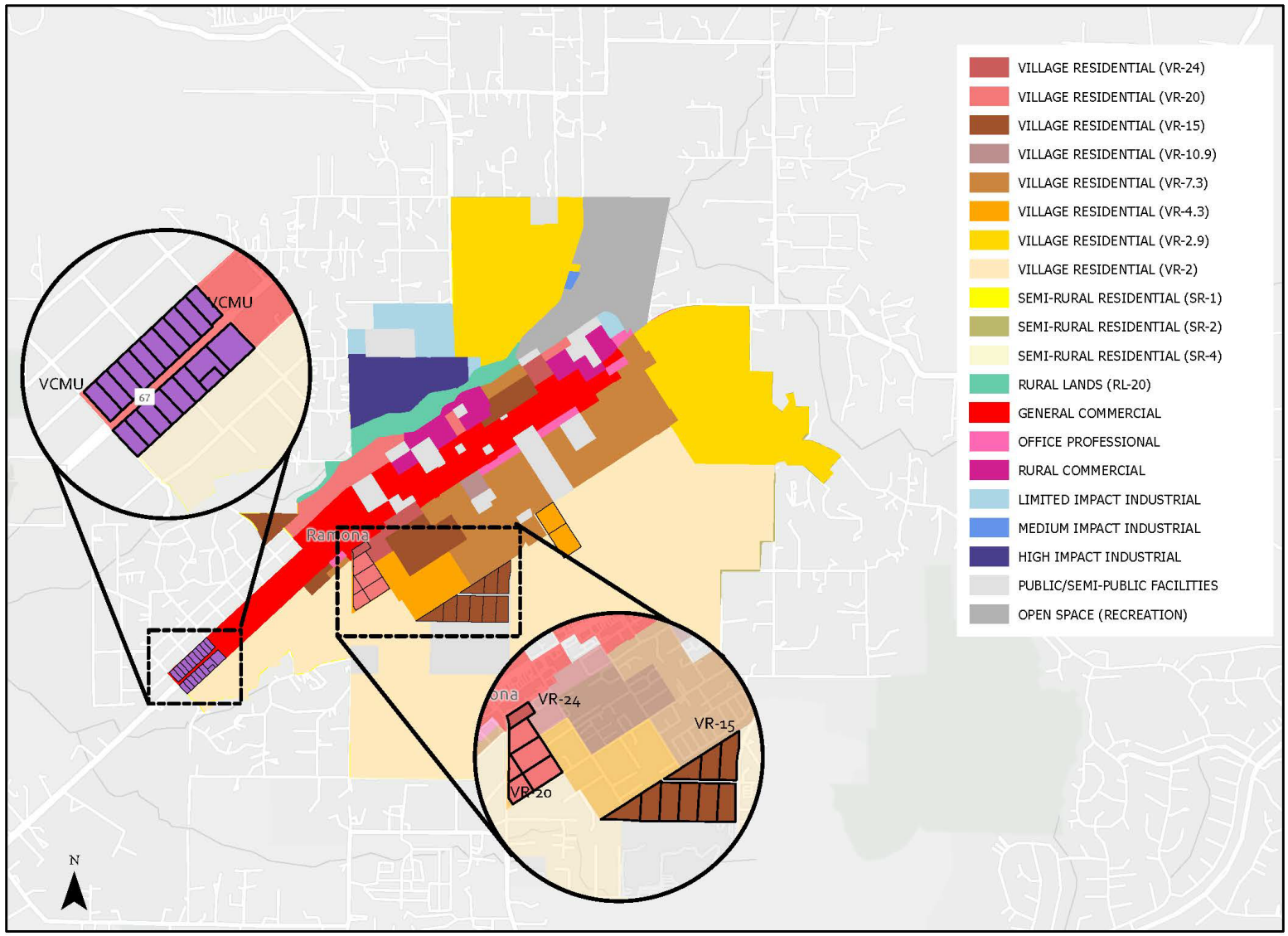
Alignment with the Financial Feasibility Assessment:
Outcomes between the analyses align.



County of San Diego Residential Density Analysis

Ramona Area

Figure 6 – Ramona Densities



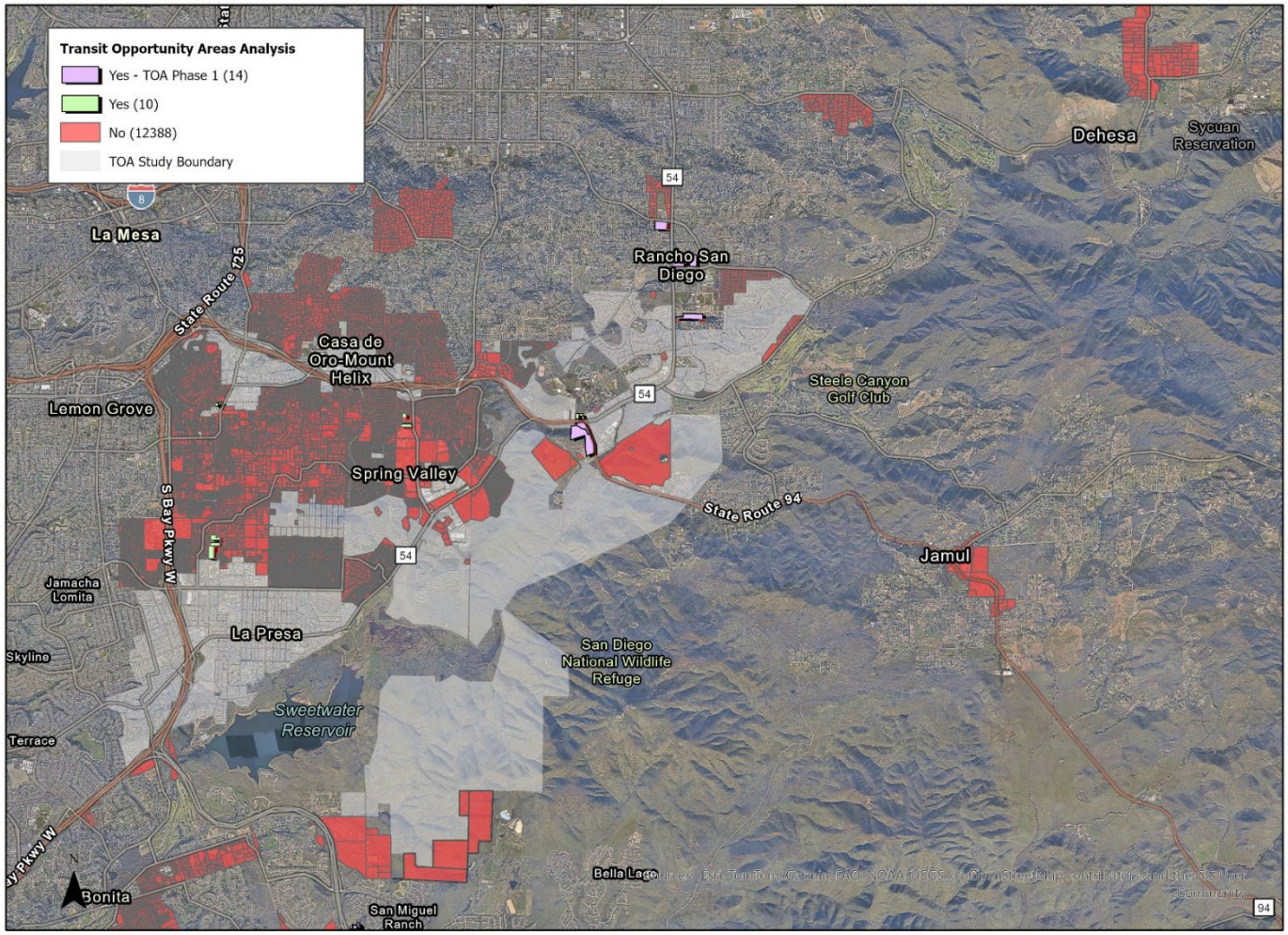
County of San Diego Residential Density Analysis

Ramona Area

Figure 7 – Spring Valley

Identified Parcels:
A total of 24 parcels were identified in the Spring Valley Area for land use zone change or density increase.

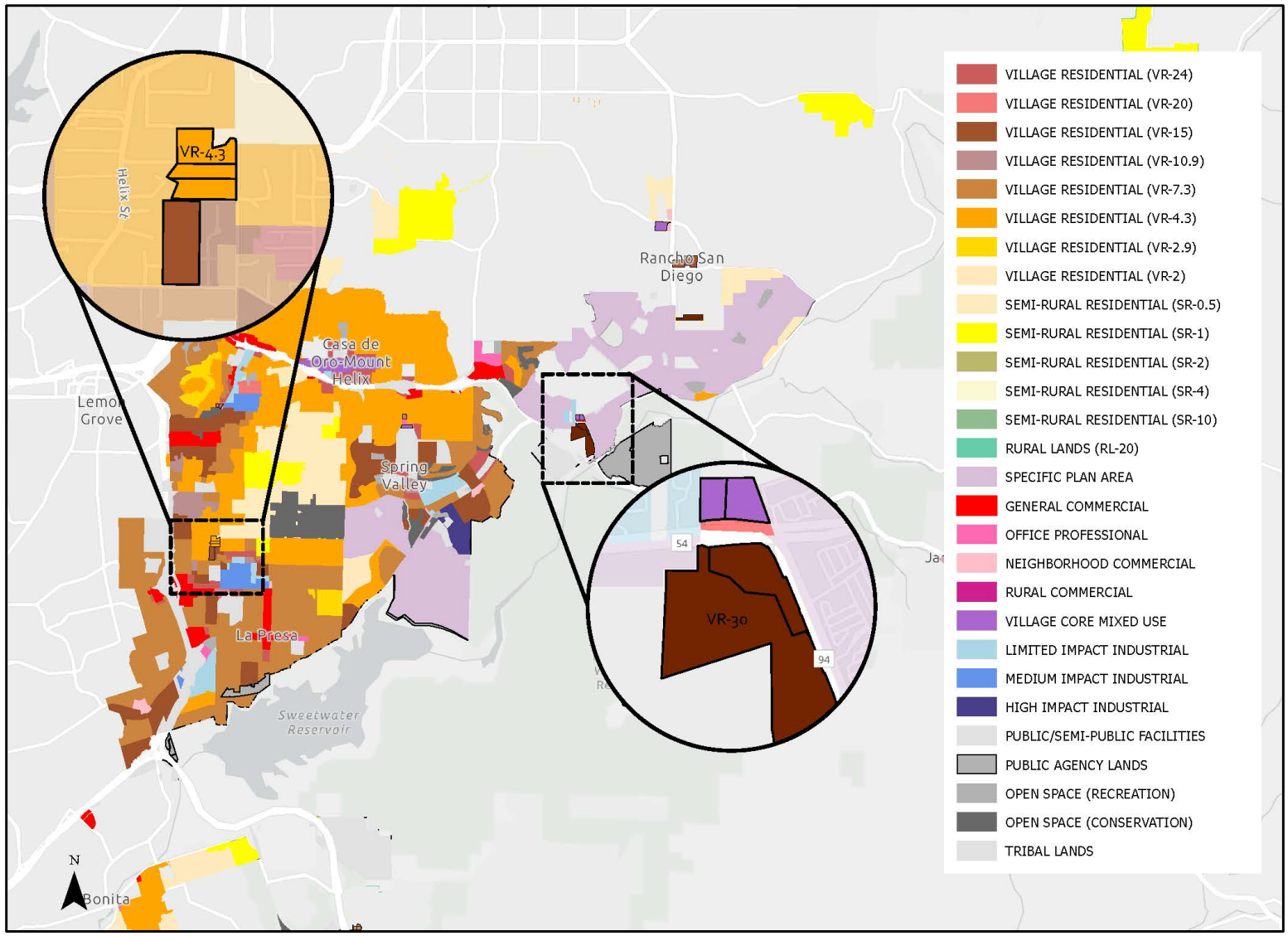
Alignment with the Financial Feasibility Assessment:
Outcomes between the analyses align.



County of San Diego Residential Density Analysis

Spring Valley Area

Figure 8 – Spring Valley Densities



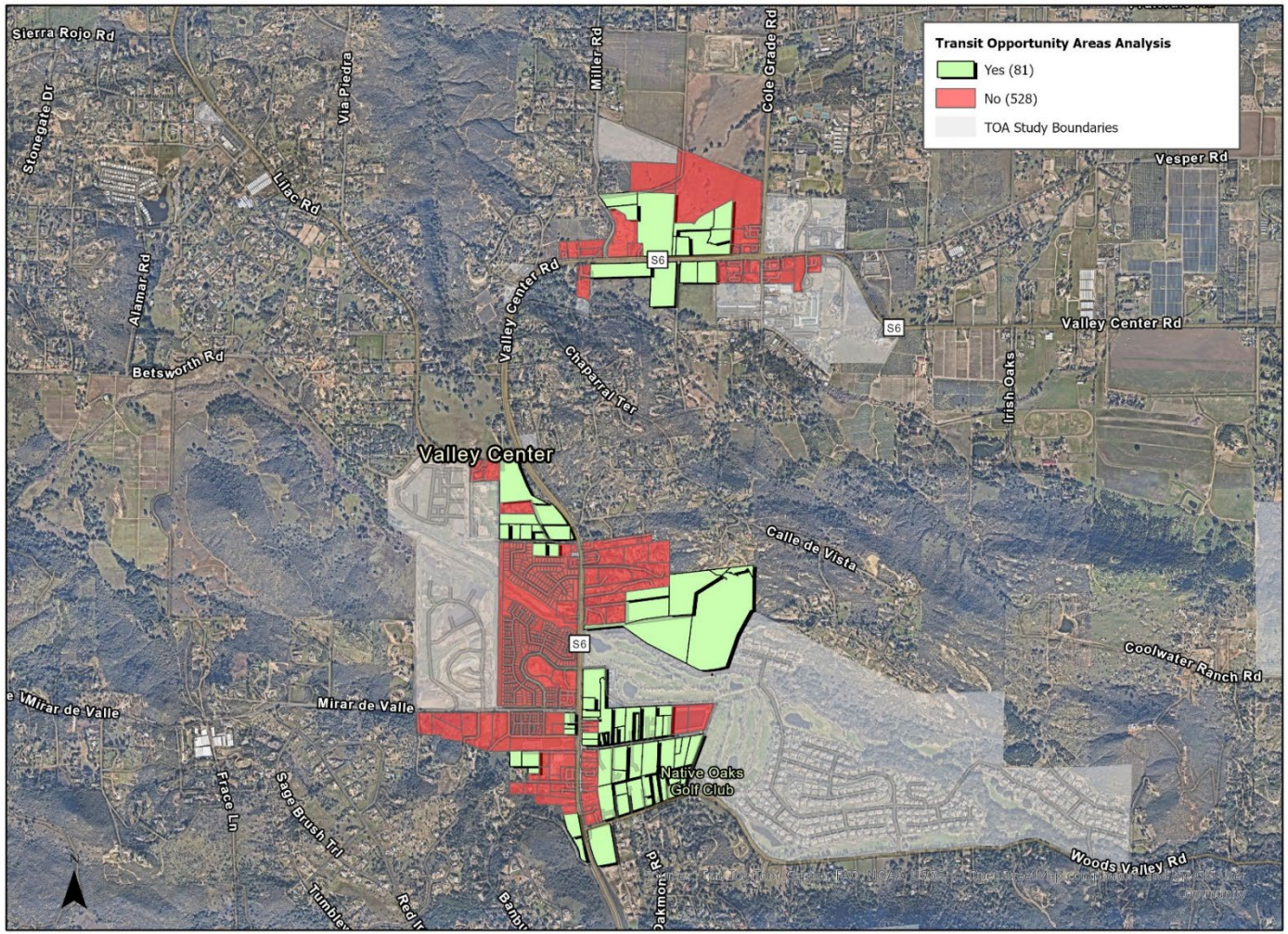
County of San Diego Residential Density Analysis

Spring Valley Area

Figure 9 – Valley Center

Identified Parcels:
A total of 81 parcels were identified in the Valley Center Area for land use zone change or density increase.

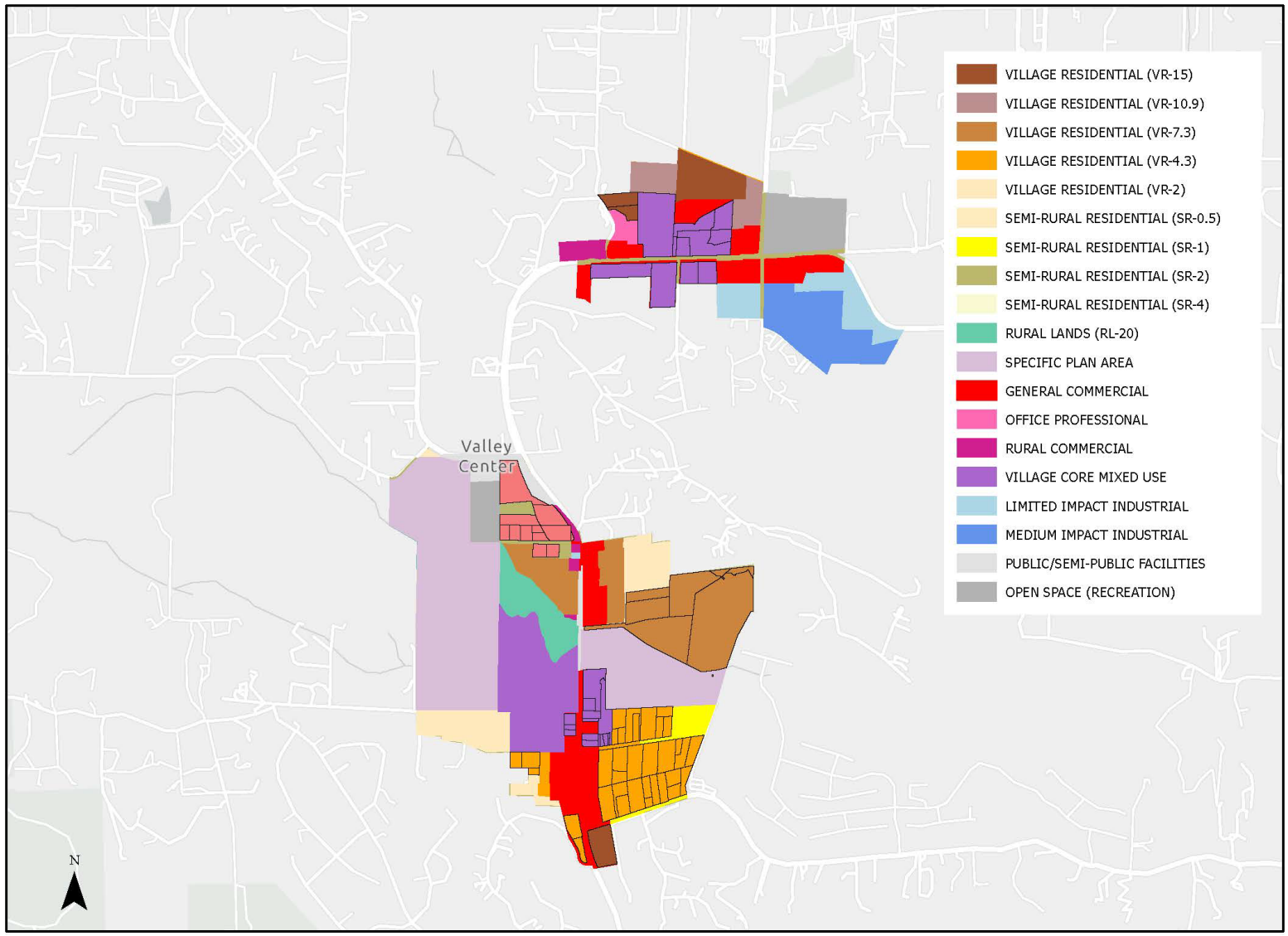
Alignment with the Financial Feasibility Assessment:
Outcomes between the analyses align.



County of San Diego Residential Density Analysis

Valley Center Area

Figure 10 – Valley Center Densities



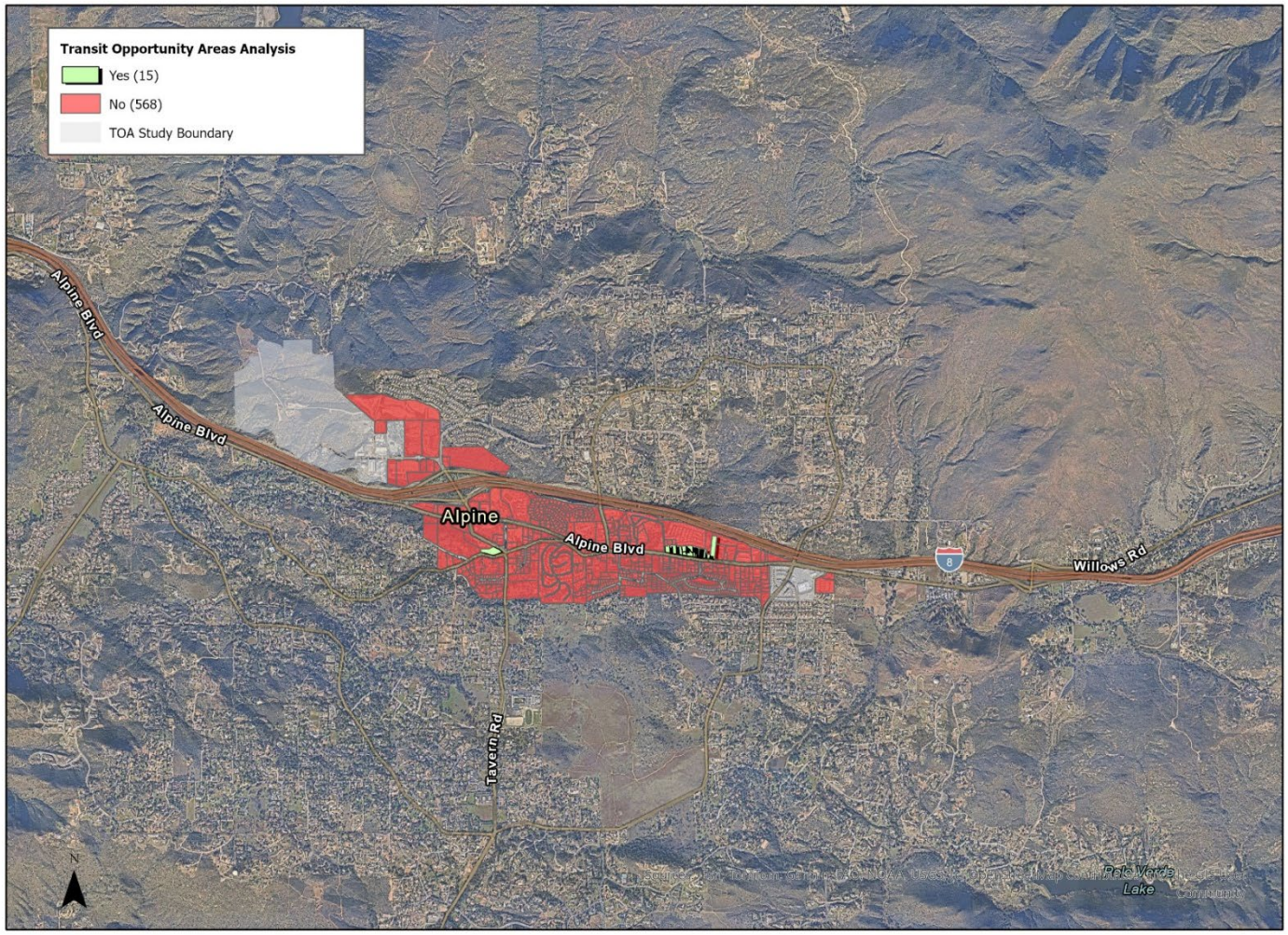
County of San Diego Residential Density Analysis

Valley Center Area

Figure 11 - Crest, Dehesa, Jamul, Alpine

Identified Parcels:
A total of 0 parcels were identified in the Crest, Dehesa, and Area for land use zone change or density increase. However, 15 parcels were identified in the Alpine Area.

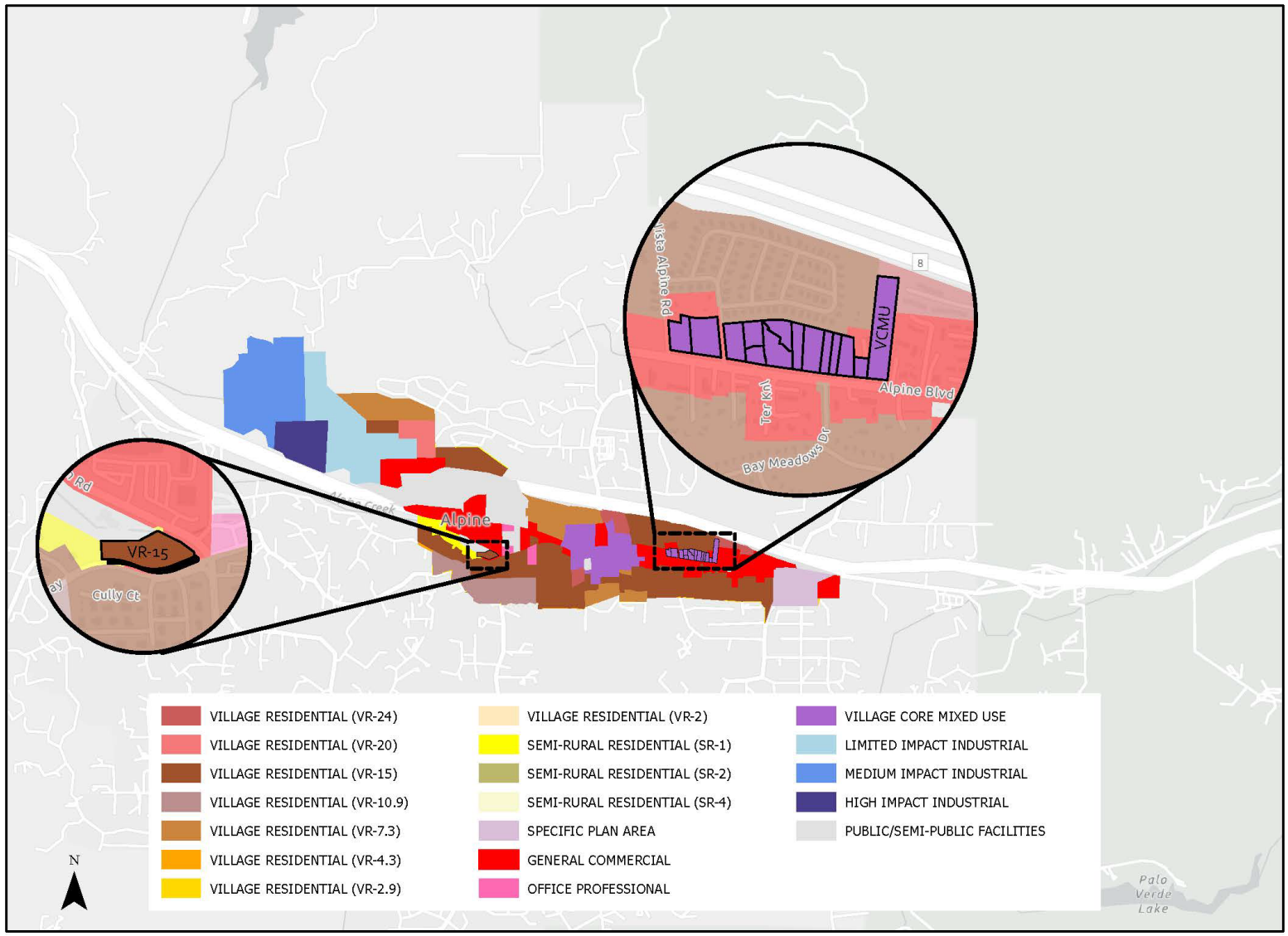
Alignment with the Financial Feasibility Assessment:
Whereas the Financial Feasibility Assessment recommends no density increases in this area, the Land Use Analysis suggests a series of parcels along Alpine Boulevard could support higher density. These parcels are currently surrounded by more intense development and in the long-term could have targeted density in this "town center" area.



County of San Diego Residential Density Analysis

Crest, Dehesa, Jamul, Alpine (1) Area

Figure 12 – Crest, Dehesa, Jamul, Alpine Densities



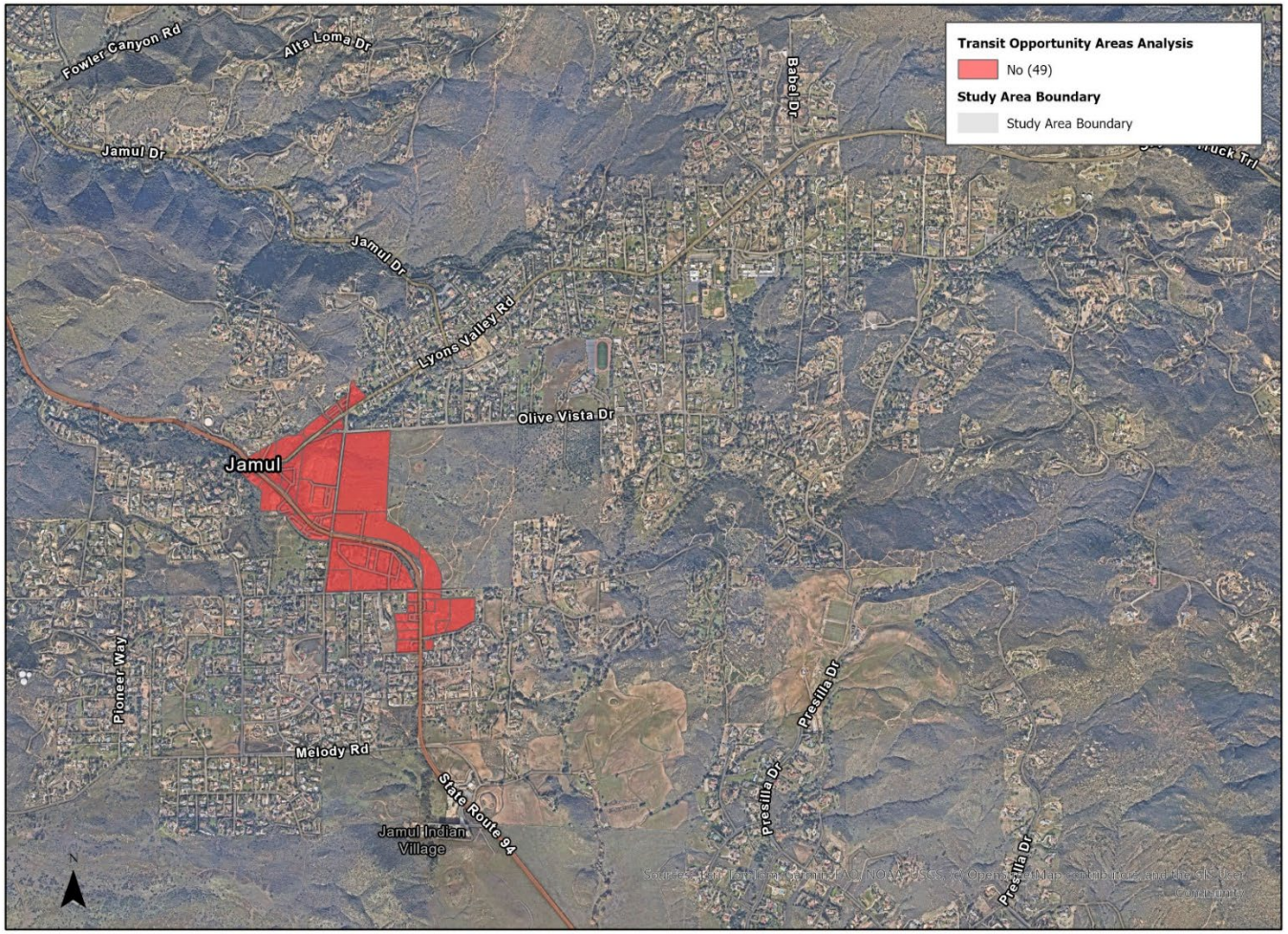
County of San Diego Residential Density Analysis

Alpine Area

Figure 13 – Crest, Dehesa, Jamul, Alpine

Identified Parcels:
A total of 0 parcels were identified in the Crest, Dehesa, and Area for land use zone change or density increase. However, 15 parcels were identified in the Alpine Area.

Alignment with the Financial Feasibility Assessment:
Outcomes between the analyses align.



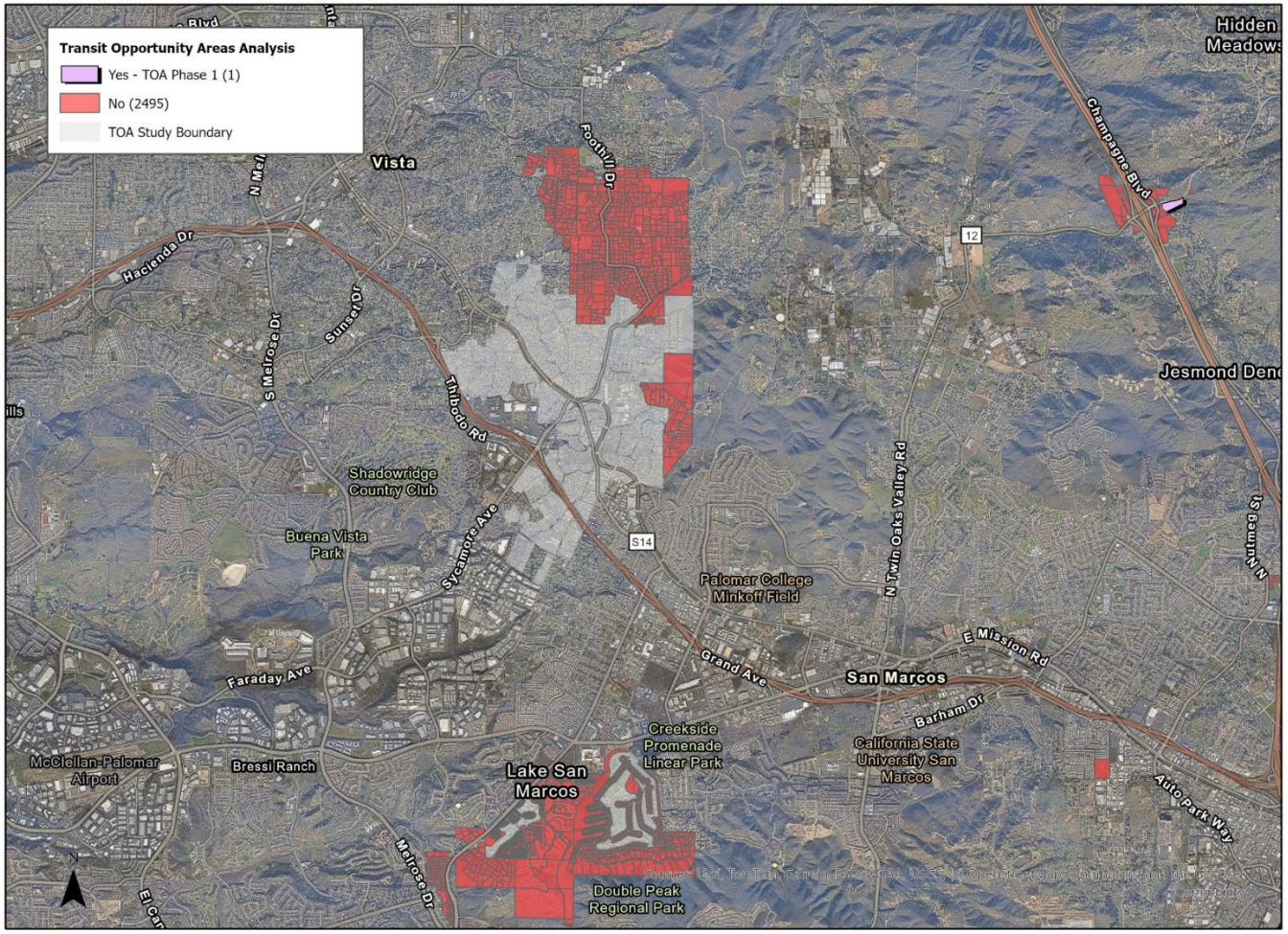
County of San Diego Residential Density Analysis

Crest, Dehesa, Jamul, Alpine (2) Area

Figure 14 – North County Metro North

Identified Parcels:
A total of 1 parcel was identified in the North County Metro North Area for land use zone change or density increase.

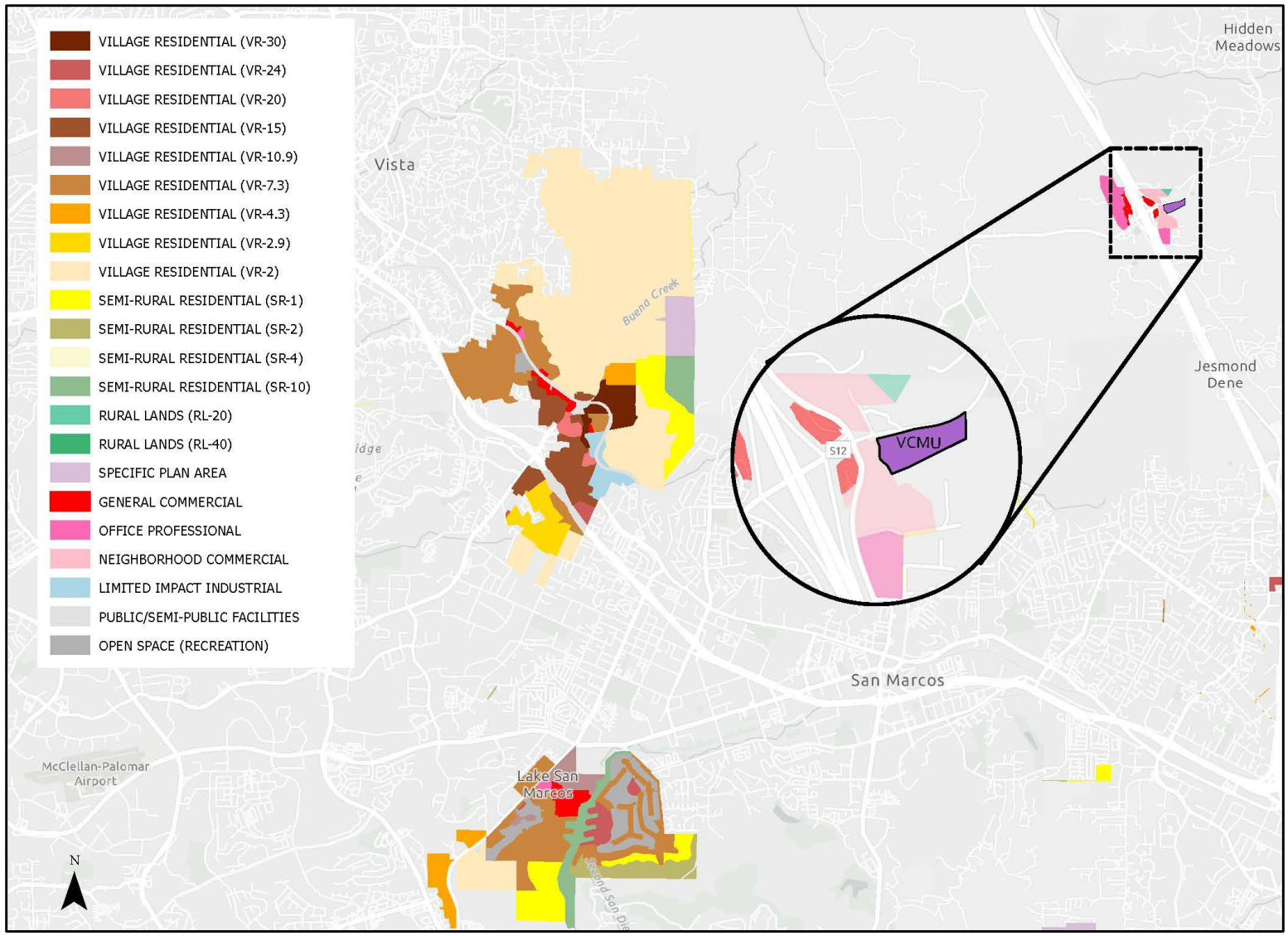
Alignment with the Financial Feasibility Assessment:
The Financial Feasibility Assessment recommends a density up to 80 units per acre along major corridors. However, the Land Use Analysis yielded only minimal parcels recommended for density increase. Most of this area is already built out, with very limited opportunity for development/ redevelopment.



County of San Diego Residential Density Analysis

North County Metro North Area

Figure 15 – North County Metro North Densities



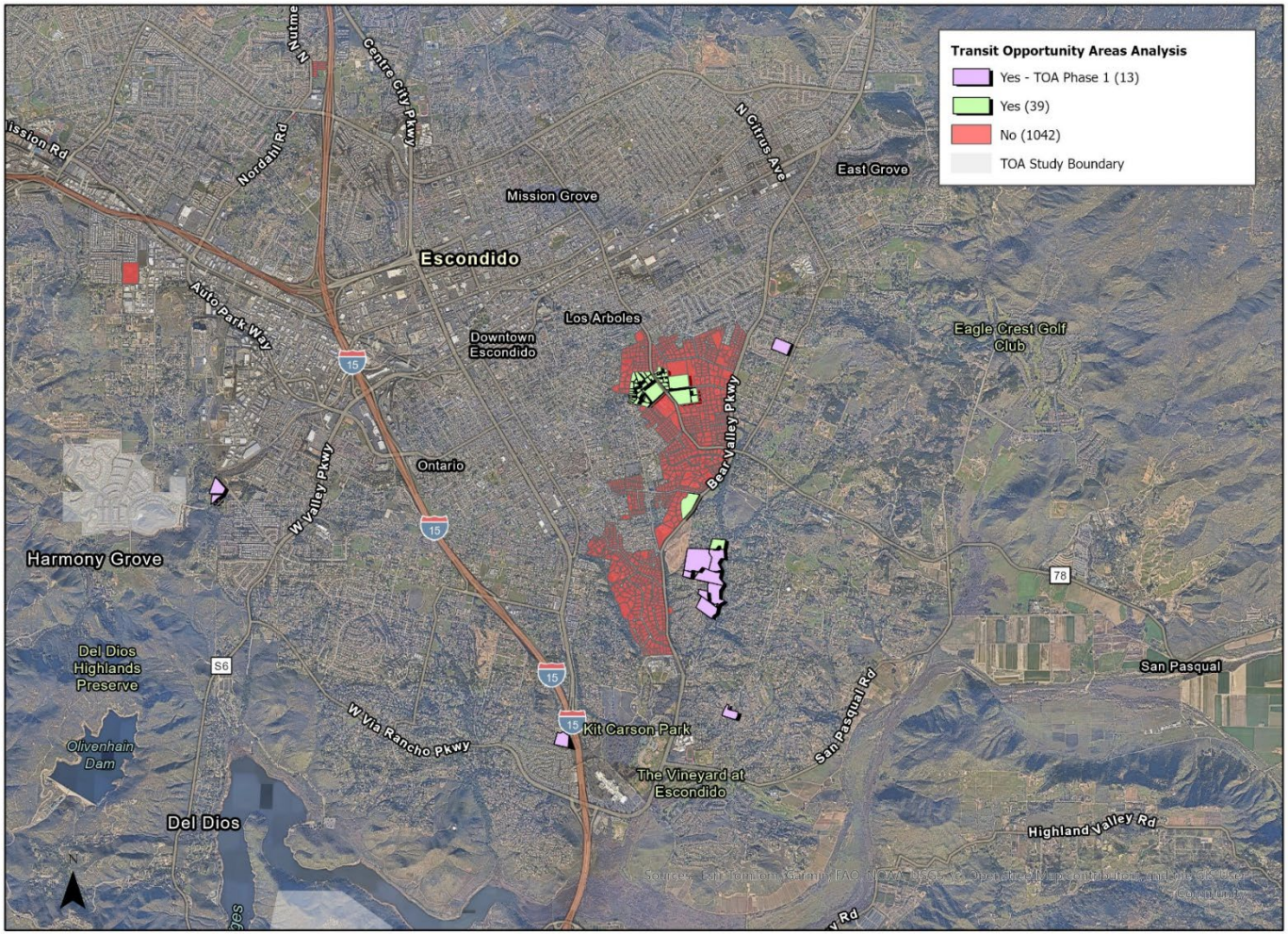
County of San Diego Residential Density Analysis

North County Metro North Area

Figure 16 – North County Metro East

Identified Parcels:
A total of 52 parcels were identified in the North County Metro East Area (sub-area map 1) for land use zone change or density increase.

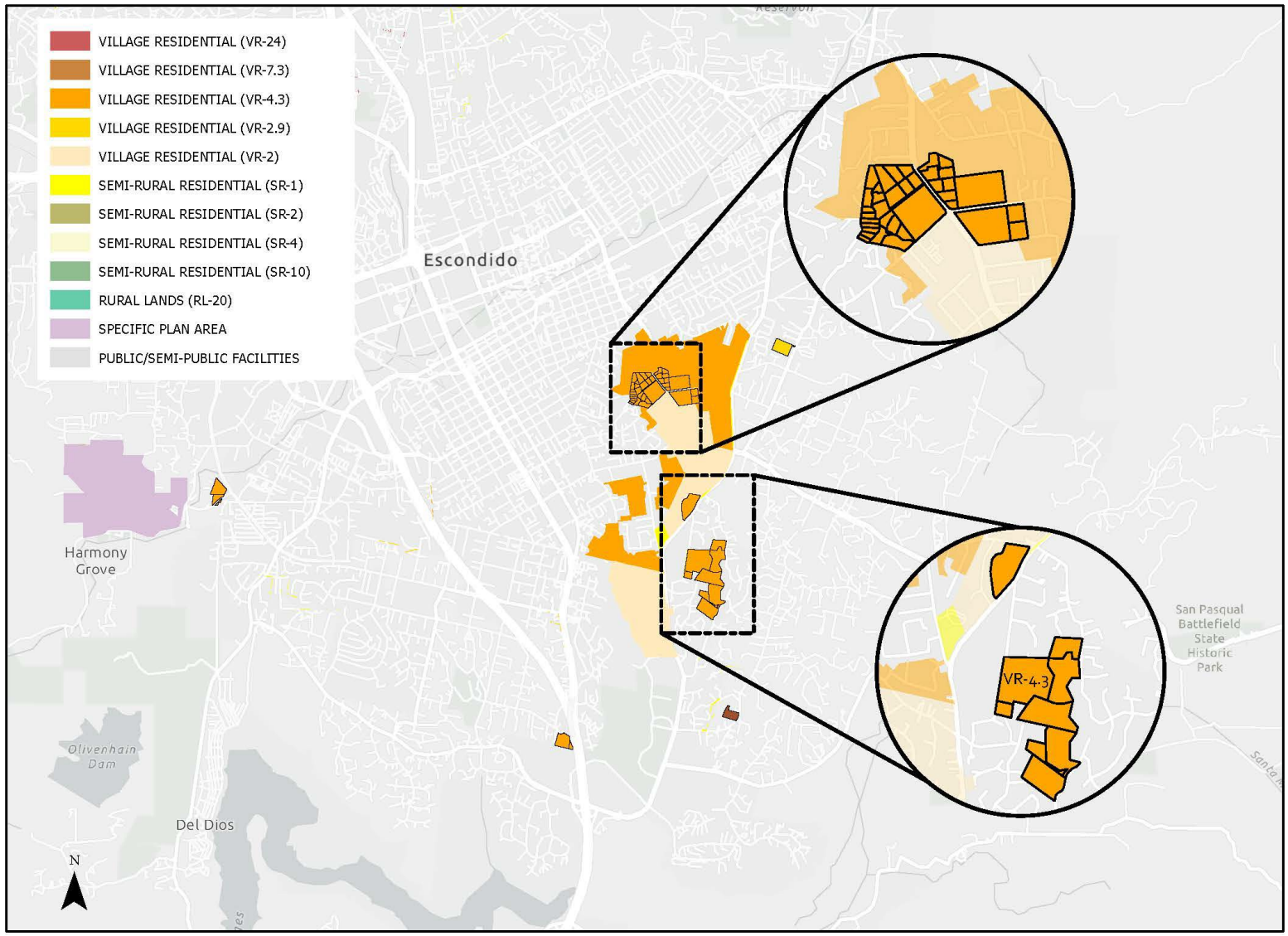
Alignment with the Financial Feasibility Assessment:
Outcomes between the analyses align.



County of San Diego Residential Density Analysis

North County Metro East (1) Area

Figure 17 – North County Metro East Densities



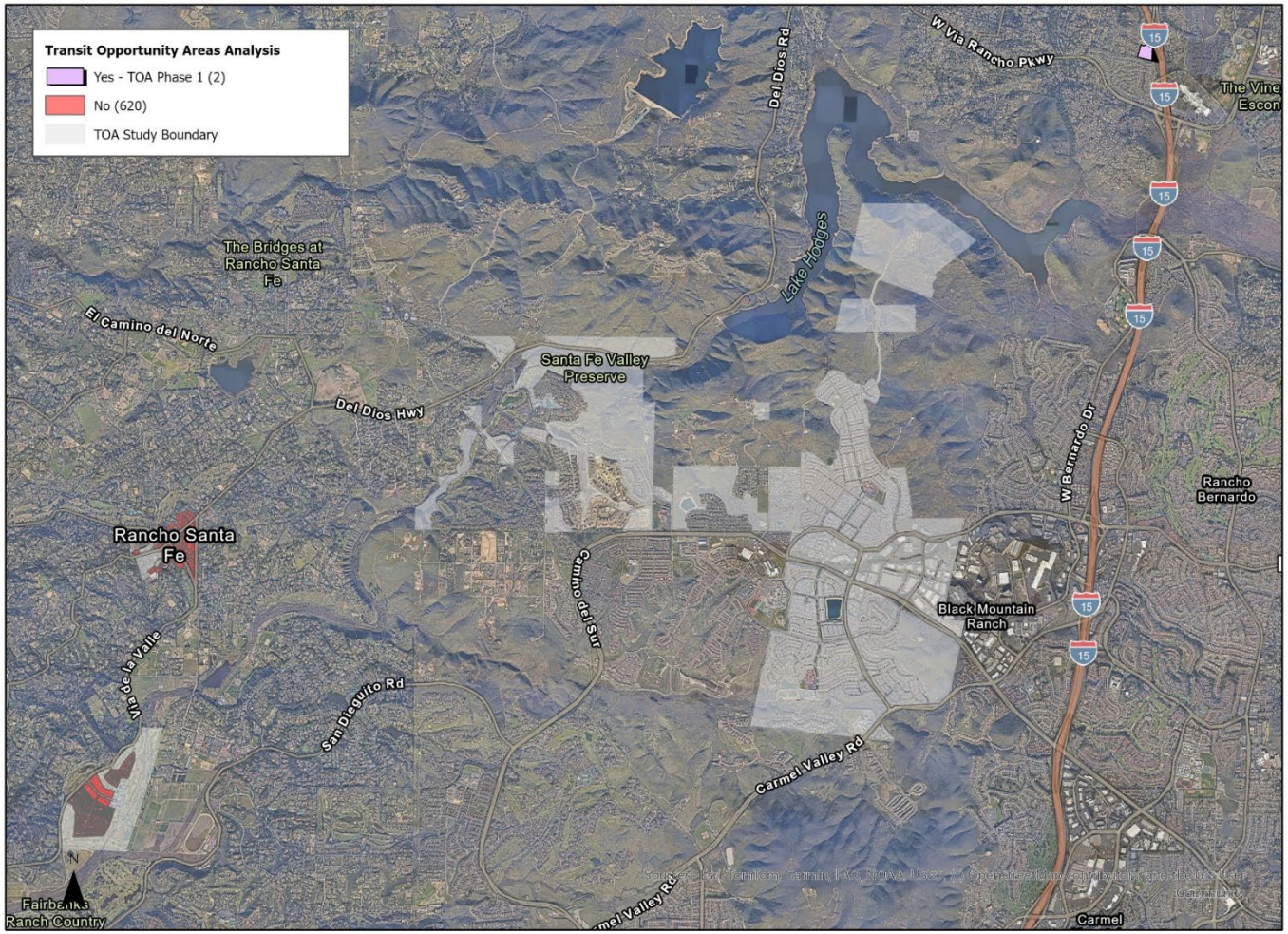
County of San Diego Residential Density Analysis

North County Metro East (1) Area

Figure 18 – North County Metro East

Identified Parcels:
A total of 2 parcels were identified in the North County Metro East Area (sub-area map 2) for land use zone change or density increase.

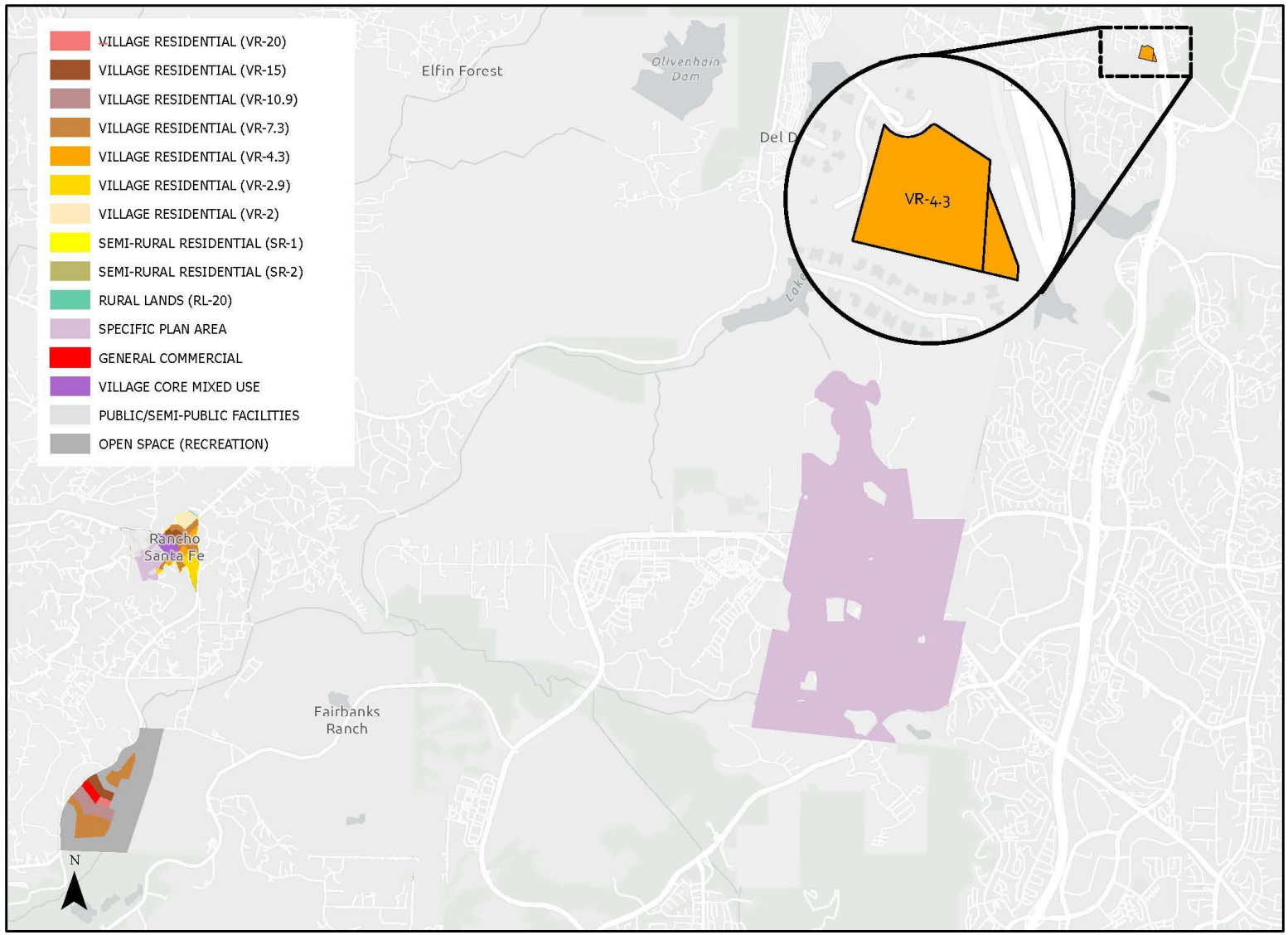
Alignment with the Financial Feasibility Assessment:
Outcomes between the analyses align.



County of San Diego Residential Density Analysis

North County Metro East (2) Area

Figure 19 – North County Metro East Densities



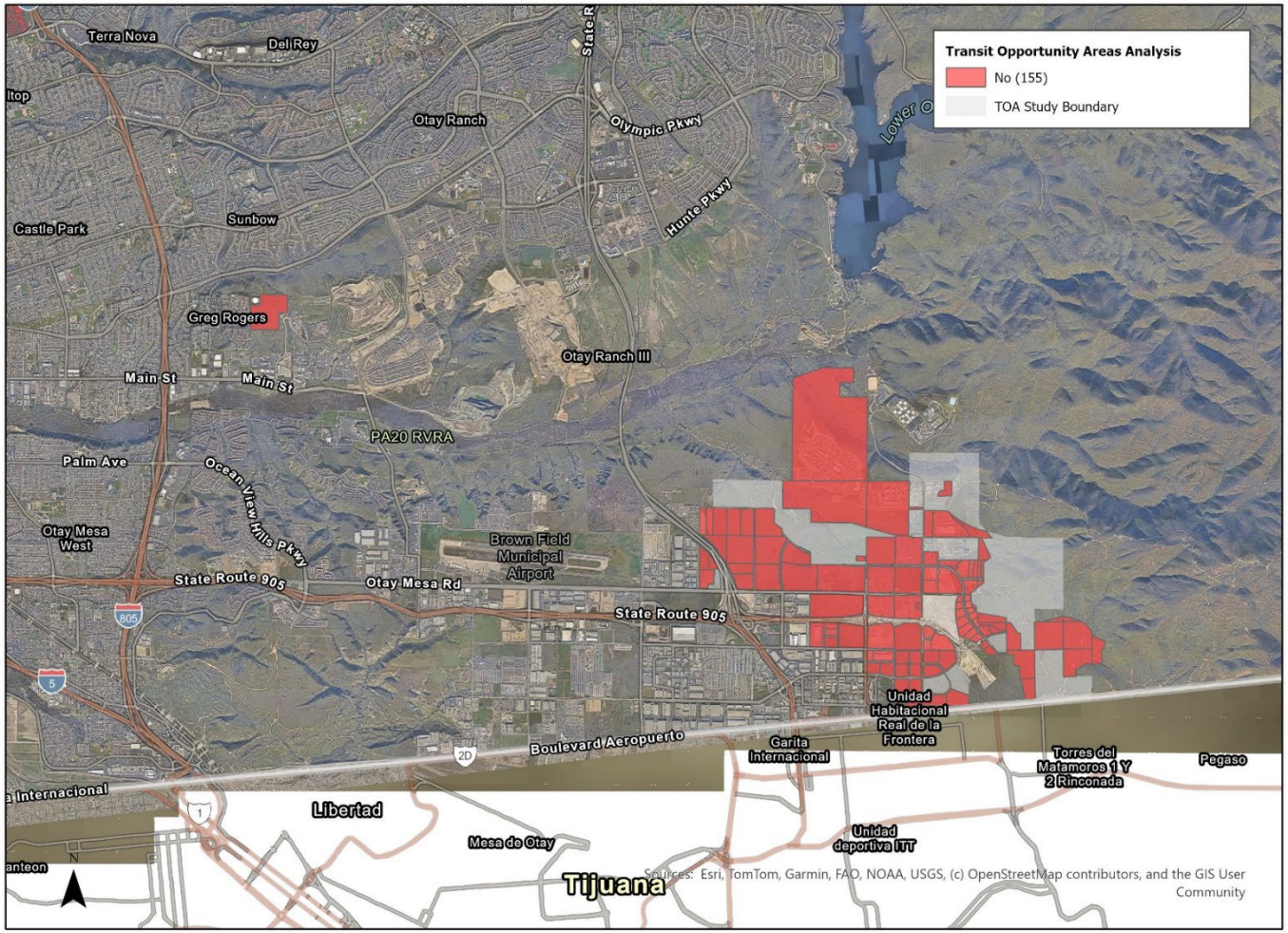
County of San Diego Residential Density Analysis

North County Metro East (2) Area

Figure 20 - Otay

Identified Parcels:
A total of 0 parcels were identified in the Otay Area for land use zone change or density increase.

Alignment with the Financial Feasibility Assessment:
The Financial Feasibility Assessment indicates weak short-term development potential but strong long-term potential up to 20 units per acre. However, the Land Use Analysis did not identify any parcels for land use zoning change. The Otay 250 Specific Plan may shift this finding to further support density increase.



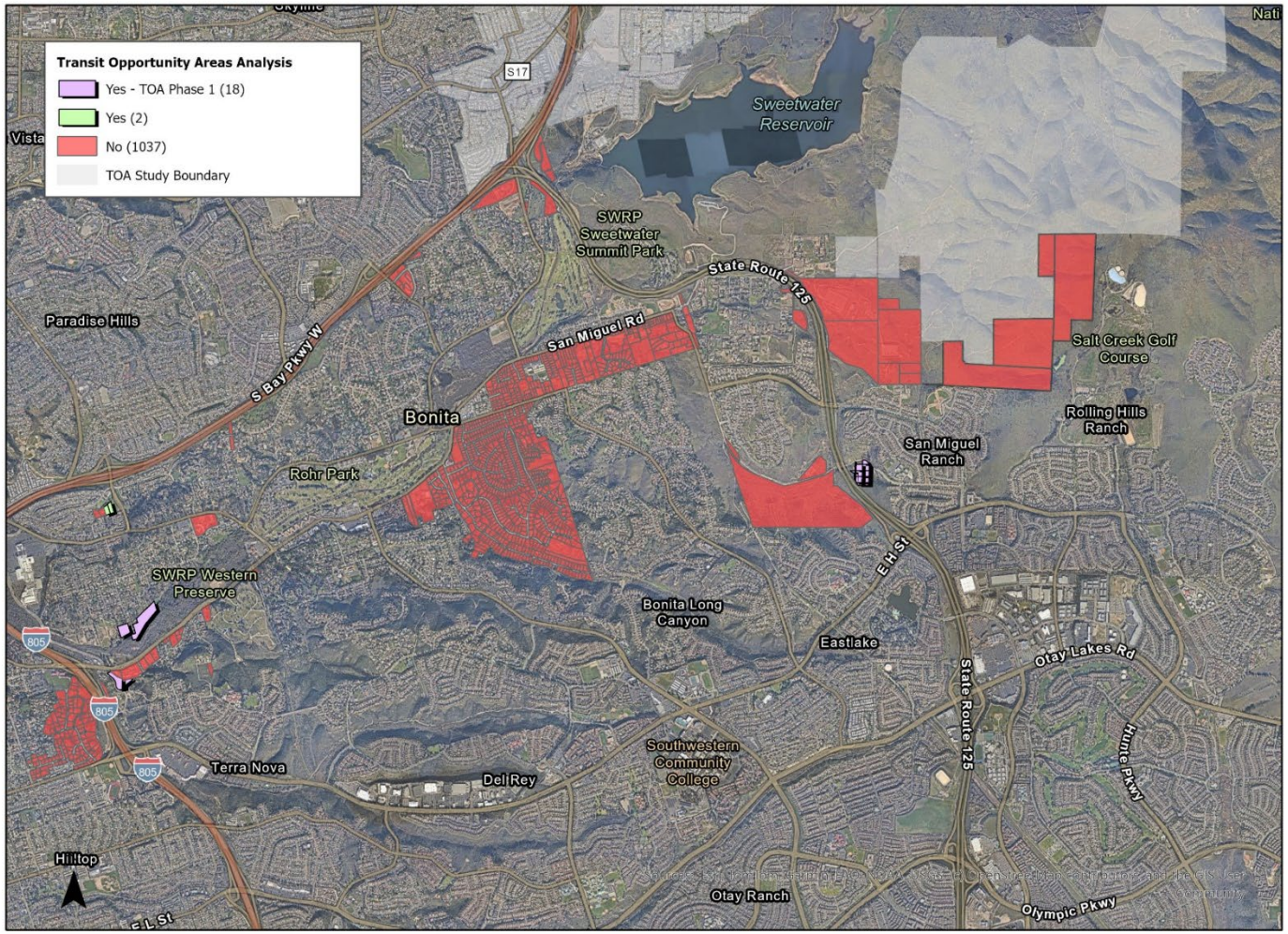
County of San Diego Residential Density Analysis

Otay Area

Figure 21 – Sweet Water

Identified Parcels:
A total of 20 parcels were identified in the Sweetwater Area for land use zone change or density increase.

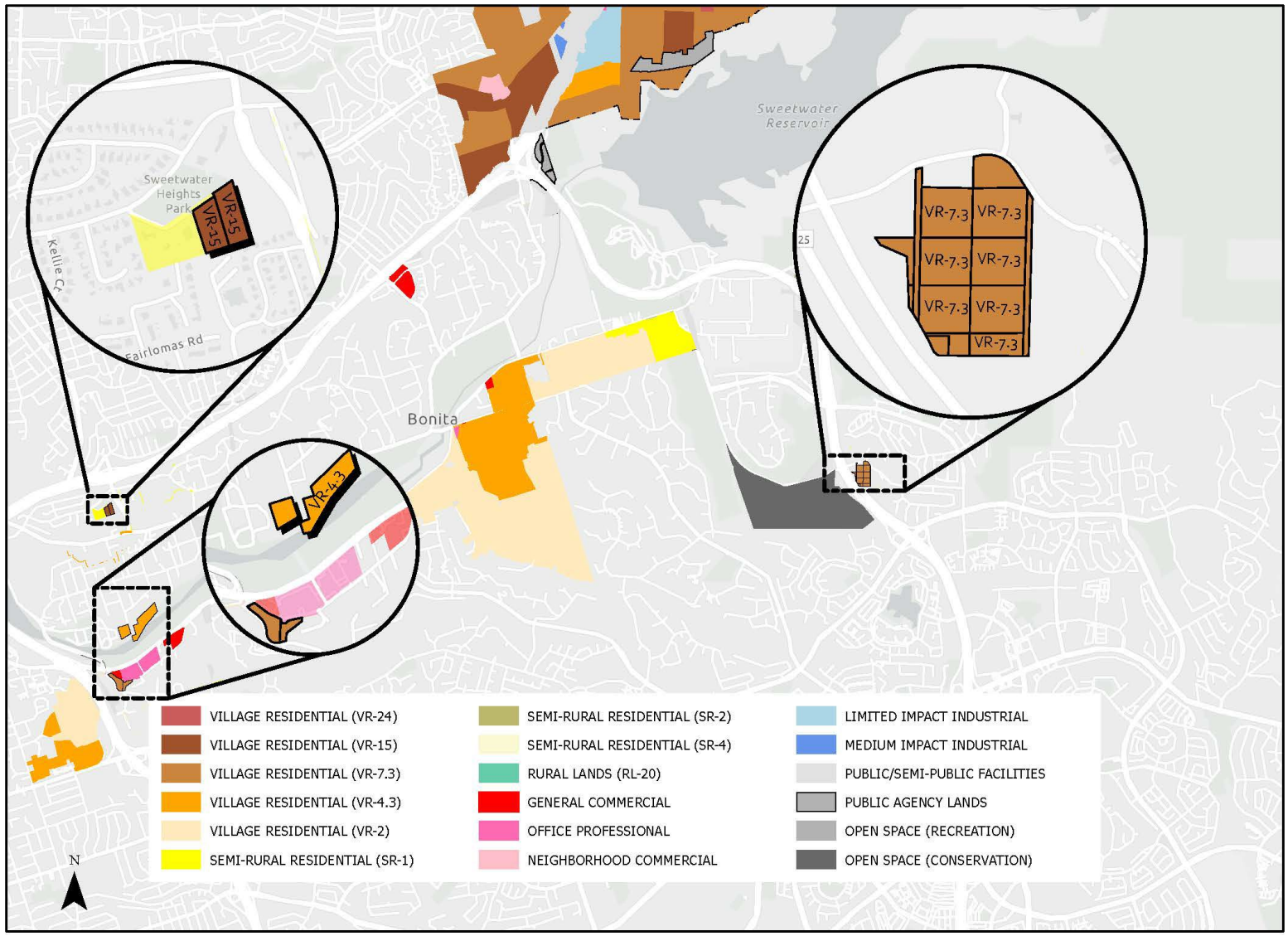
Alignment with the Financial Feasibility Assessment:
Outcomes between the analyses align.



County of San Diego Residential Density Analysis

Sweet Water Area

Figure 22 – Sweet Water Densities



County of San Diego Residential Density Analysis

Sweetwater Area

Appendix E. VMT Analysis

MEMORANDUM

To:	Jacob Armstrong, County of San Diego
	Damon Davis, County of San Diego
From:	Stephen Cook, TE, Intersecting Metrics
Date:	January 21, 2025
Regarding:	**County of San Diego Village Area Vehicle Miles Traveled Impact Analysis**

The purpose of this technical memorandum (memo) is to evaluate the magnitude of the vehicle miles traveled (VMT) related impacts associated with the build out of the County of San Diego's (County) Village Areas, and identify potential mitigation stratifies to either reduce or fully mitigate the impacts. This information will potentially be used to determine the feasibility of streamlining development within the Village Areas through a specific plan and/or the development of a mitigation program,

Village Areas

The County of San Diego General Plan identifies a series of areas within the Unincorporated County where higher density development and mixed-use development will be concentrated, known as Village Areas. The main goal of the Village Areas is to support multi-modal and mixed-use travel, as outlined in Goal LU-5.1 of the County of San Diego General Plan:

> *Reduction of Vehicle Trips within Communities. Incorporate a mixture of uses within Villages and Rural Villages and plan residential densities at a level that support multi-modal transportation, including walking, bicycling, and the use of public transit, when appropriate.*

This makes the Village Areas an ideal location to prioritize development in a sustainable way, as well as to draw and expand more regional transit services and Mobility Hub locations to the Unincorporated County.

Assumed Growth

To calculate the magnitude of the VMT related impacts that may be associated with the build out of the Village Areas, the potential growth of the areas needs to be calculated first. Majority of the Village Areas have not yet been fully developed, and only a few development projects have been designed and are going through the entitlement process. Therefore, the actual potential growth within the Village Areas has not been derived, so the growth within these areas must be estimated. To estimate the potential growth within the Village Areas, a parcel level analysis was conducted for all parcels located within the village boundaries and was estimated based on the following:

- *Parcel Zoning* - The assumed land uses and maximum densities for each parcel were derived based on the existing zoning of the parcel.
- *Developable Areas* – To determine areas on a parcel that could be developed, the steep slopes, flood plain areas, and environmentally protected areas were all overlayed and removed from the parcels "developable area."

- *Existing Land Uses* – Existing land uses on the site were accounted for and removed from the overall potential development total. Parcels that already had multi-family units were not assumed to be redeveloped; thus, no additional density was assumed.

- *Minimum parcel size* – Small parcels, under 1 acre in developable area, were screened out from the growth analysis. This was assumed that the parcel would be too small for a larger development and would qualify for a small project exemption, or the parcel would be too small for new development to occur.

Based on the criteria outlined above, the developable area and the maximum land use density were multiplied for each qualifying parcel to determine the total number of potential units that could be built on the parcel. The existing uses were then subtracted from the total number of potential units to determine the overall growth.

It should be noted that this analysis only focused on residential development, as land uses such as industrial and office are uncommon within the Village Areas, and other uses such as retail and services would be locally serving, which should have a less than significant VMT related impact. Finally, to be conservative, the maximum density was assumed on all qualifying parcels as it represents a worst-case analysis, from a VMT related impact standpoint.

Table 1 summarizes the potential growth within each of the Village Areas, the parcel-by-parcel calculations are provided in **Attachment 1**.

Table 1
Growth by Village Area

Row Labels	Existing Units	Total Potential Units	Potential Increase in Units
Alpine	2,236	6,006	4,855
Bonsall	523	1,510	1,312
Boulevard Rural Village	119	1038	957
Campo and Cameron Corners Rural Village - North	36	369	344
Campo and Cameron Corners Rural Village - South	265	2,282	2,017
Crest Rural Village	535	634	119
Dehesa Rural Village	88	270	183
Descanso Rural Village	354	581	304
East Willows Road	147	2,283	2,142
Fallbrook	2,887	5,814	3,511
Hidden Meadows East	988	1,046	741
Hidden Meadows West	355	1,436	1,127
Jacumba Rural Village	272	3,859	3,629
Jamul Rural Village	278	297	271
Julian Historic District	136	345	230
Lake Morena Rural Village	367	554	420
Lakeside	0	35	35
North County Metro - East	7	4	3
North County Metro - North	0	2	2
Otay	1	803	802

Table 1
Growth by Village Area

Row Labels	Existing Units	Total Potential Units	Potential Increase in Units
Pauma	355	1,765	556
Pine Valley Rural Village	667	1,386	758
Potrero Rural Village	3	109	106
Rainbow Rural Village	130	555	436
Ramona	5,067	8,118	5,809
Spring Valley	0	2	2
Sunshine Summit	50	160	117
Tecate Special Study Area	48	676	631
Valley Center North	46	1,916	1,874
Valley Center South	708	1,398	806
Total	**16,668**	**45,253**	**35,099**

Vehicle Miles Traveled Analysis

After the potential growth was determined within the Village Areas, a VMT impact analysis was conducted to determine the magnitude of the VMT related impacts associated with the potential growth. This section identifies the threshold, methods, sources, and calculations used to identify these impacts.

Significance Thresholds

The County of San Diego adopted its Transportation Study Guidelines (TSG) in September 2022. Section 3.3.1 of the TSG identifies a series of screening criteria in which projects are exempt from conducting a CEQA VMT analysis and are assumed to have a less significant impact. The following screening criteria were used to screen out Village Area parcels from the VMT analysis:

- *Projects Located in a VMT Efficient Area* – Parcels located in Traffic Analysis Zones (TAZs) in which the VMT / capita is at least 15% below the regional mean were assumed to have a less than significant impact.

- *Projects located in Infill Village Area* - Parcels located in an identified Infill Village Area are assumed to have a less than significant impact (see Appendix D of the TSG for the definition of an Infill Village Area).

The TSG also includes a screening criteria for small projects that generate less than 110 vehicular trips per day, as well as for projects in which all housing units provided are affordable. To be conservative, these were not applied in the analysis as it is not known if parcels would be combined to create larger developments, which would exceed the small project thresholds, or if affordable units would be provided.

For parcels that are not screened out from conducting a VMT analysis, Section 3.3.2 of the TSG prescribes the following impact threshold for residential uses:

- *Residential:* 15 percent below the County Regional average VMT per Resident. This includes the entire San Diego County region, including the incorporated cities.

Thus, any VMT / capita that is generated beyond this threshold is considered an impact and would need to be reduced to the 15% below the regional mean to reduce the impact to a less than significant level.

Modeling Data

The VMT data used in the impact analysis was derived from the base year conditions of the SANDAG Series 14 Activity Based Model (ABM 2+) Scenario ID 458[1]. The VMT / capita for each parcel was extracted from the model based on the TAZ in which it is located. Based on modeling data, the regional mean for VMT / capita is 18.9 miles. Therefore, the County's significance threshold would be 16.1 miles (18.9 miles X 85%).

VMT Calculation

VMT related impacts were evaluated at the parcel level. Parcels that have the potential for growth that were not screened out from conducting a VMT analysis, and generate a VMT / capita higher than the County's threshold (16.1 miles) were identified to have a VMT related impact. The magnitude of the impact for these parcels were calculated based on the following process:

Parcel VMT / Capita – 16.1 (Threshold) = Excess VMT / Capita

Excess VMT / Capita X Parcel Unit Growth X 2.67[2] (Average People Per Household) = Excess VMT Generated

The excess VMT generated is assumed to be the total VMT that would need to be mitigated to reduce the impacts of the potential developments to a less than significant level.

Analysis Results

The analysis process outlined above was applied to every parcel within the Village Areas. **Table 2** summarizes the results of the analysis by Village Area. The parcel-by-parcel calculations are provided in **Attachment 2**.

Table 2
Projected VMT Impact by Village Area

Row Labels	Potential Increase in Units	Excess VMT	Excess VMT per Unit
Alpine	4,855	229,055.1	47.2
Bonsall	1,312	54,068.4	41.2
Boulevard Rural Village	957	111,170.7	116.2
Campo and Cameron Corners Rural Village - North	344	38,568.6	112.1
Campo and Cameron Corners Rural Village - South	2,017	211,982.1	105.1
Crest Rural Village	119	3,734.4	31.4
Dehesa Rural Village	183	5,956.6	32.5
Descanso Rural Village	304	30,691.8	101.0
East Willows Road	2,142	98,773.1	46.1
Fallbrook	3,511	52,344.3	14.9
Hidden Meadows East	741	32,465.9	43.8

[1] https://sandag.maps.arcgis.com/apps/webappviewer/index.html?id=bb8f938b625c40cea14c825835519a2b
[2] https://data.census.gov/table/ACSST1Y2023.S1101?q=household%20size&g=050XX00US06073

Table 2
Projected VMT Impact by Village Area

Row Labels	Potential Increase in Units	Excess VMT	Excess VMT per Unit
Hidden Meadows West	1,127	52,215.6	46.3
Jacumba Rural Village	3,629	207,578.2	57.2
Jamul Rural Village	271	8,762.3	32.3
Julian Historic District	230	7,133.4	31.0
Lake Morena Rural Village	420	44,449.1	105.8
Lakeside	35	0.0	0.0
North County Metro - East	3	48.9	16.3
North County Metro - North	2	2.2	1.1
Otay	802	1,113.1	1.4
Pauma	1,556	122,932.3	79.0
Pine Valley Rural Village	758	78,949.0	104.2
Potrero Rural Village	106	10,251.1	96.7
Rainbow Rural Village	436	25,708.4	59.0
Ramona	5,809	101,720.2	17.5
Spring Valley	2	0.0	0.0
Sunshine Summit	117	18,784.7	160.6
Tecate Special Study Area	631	52,759.6	83.6
Valley Center North	1,874	77,055.4	41.1
Valley Center South	806	28,172.5	35.0
Total	**35,099**	**1,706,447.0**	**48.6**

As shown in the table, both the average VMT / capita and the Total VMT impact vary widely between the different Village Areas. As such, mitigation solutions may be more feasible in the Village Areas with a lower projected impact than in the higher impact areas.

Mitigation Recommendations

As outlined in the previous section, most Village Areas that have the potential for growth will experience VMT related impacts as that growth occurs. As such, the following identifies potential mitigation solutions that may help to partially, or possibly fully, mitigate the potential impacts:

Develop a Local VMT Mitigation Program – While majority of the unincorporated areas of the County are rural in nature and VMT reducing facilities would have little to no effect, the Village Areas are the specific places in which urban style development is projected to occur. Thus, the County could develop a Local VMT Mitigation Program (either a fee or exchange program) that focuses on developing multi-modal infrastructure, specifically in the more efficient Village Areas where it has the most potential to be the most effective.

Participate in the Upcoming Regional VMT Mitigation Program – SANDAG and the County of San Diego are currently working with the other jurisdictions in the San Diego Region to develop a Regional VMT Mitigation Program. The main goal of the program will be to encourage jurisdictions in the San Diego Region to work together and share resources to implement the most effective VMT reducing infrastructure and programs, regardless of their location. By targeting the most

effective infrastructure, regardless of location, the region will get its highest return on its investment and allow new development a more feasible path to mitigate their VMT related impacts. The Regional VMT Mitigation Program is still in development, so its scope and effectiveness within the unincorporated areas of the County has not yet been determined. However, it is recommended that the County continue to pursue the regional program and incorporate it into any future mitigation strategies.

Partner with Other Jurisdictions in the Region – Some jurisdictions within the San Diego Region have already implemented, or are in the process of implementing, VMT Mitigation Programs. In November of 2020, the City of San Diego implemented their Active Transportation In-Lieu Fee (ATILF) program that established the cost to reduce one mile of vehicular travel within the City to be $1,769.11 (Year 2025 dollars). Due to the size and urban nature of the City of San Diego, it has a large capacity to implement VMT reducing infrastructure. Thus, its capacity to reduce VMT may exceed its needs for new development. Therefore, the County could partner with the City of San Diego to allow development within the Village Areas to participate in the City of San Diego's ATILF to offset some or all of its VMT related impacts. Note, this recommendation would not be limited to just the City of San Diego. The County could partner with other urban jurisdictions such as the Port of San Diego, City of Solana Beach, and the City of National City, as well.

Include an Affordable Housing Requirement – As outlined in Appendix G of the TSM, affordable housing units generate less trips than market rate housing, resulting in lower VMT generation rate. Therefore, to reduce the total VMT associated with the potential growth within the Village Areas an affordable housing requirement could be placed on all projects that are seeking streamline growth. Additionally, the County could develop an affordable housing in-lieu fee program, which would offset a developments affordable housing requirements by paying a fee or allow a development to offset its overall VMT impact by paying an additional fee, if needed.

Develop a Program that Reduces Existing VMT to Help Offset Future Impacts – The County could develop a grant to help fund the implementation of VMT reducing Transportation Demand Management (TDM) measures for existing businesses. Under this program, businesses could apply for grant funding to implement TDM measures such as carpool programs (infrastructure and incentives), leases for van pools, the implementation of bike racks, repair stations, lockers, and showers within their business, and potential funding sources for parking cashout and transit pass subsidy programs. The grant programs would be funded through VMT credits that are sold to new development, which would offset their VMT related impacts. The program could prioritize businesses that are located within the unincorporated portions of San Diego County, but could also be expanded to include the incorporated areas as well.

Restrict the Areas in Which Development is Streamlined – As shown in Table 2, there are some Village Areas within the County that are projected to have an excess VMT of over 35 miles per unit. The VMT related impacts within these areas will be incredibly difficult to mitigate and would take an unproportional amount of the County's resources to do so. Therefore, it is recommended that the County limit the Village Areas that are included within the streamlining process to the areas that have an excess VMT of less than 35 miles. Should a portion of these highly impacted areas be identified as critical for County, it is recommended that the County seek a separate CEQA action to override the VMT impacts within these areas. **Table 3** identifies the Village Areas which have an excess VMT per unit below 35 miles.

Table 3
Projected VMT Impact by Village Area - Under 35 Miles

Row Labels	Potential Increase in Units	Excess VMT	Excess VMT per Unit
Crest Rural Village	119	3,734.4	31.4
Dehesa Rural Village	183	5,956.6	32.5
Fallbrook	3,511	52,344.3	14.9
Jamul Rural Village	271	8,762.3	32.3
Julian Historic District	230	7,133.4	31.0
Lakeside	35	0.0	0.0
North County Metro - East	3	48.9	16.3
North County Metro - North	2	2.2	1.1
Otay	802	1,113.1	1.4
Ramona	5,809	101,720.2	17.5
Spring Valley	2	0.0	0.0
Valley Center South	806	28,172.5	35.0
Total	**11,773**	**208,988**	**17.8**

As shown in the Table, the Village Areas that have an excess VMT per unit of 35.0 miles or less, would still include almost a third of the potential development (11,773 units), but would only need to mitigate about 12% of the excess VMT (208,988 miles). Focusing on a VMT mitigation program specifically within these Village Areas might provide the best value and the most feasible path word for development.

Conclusion

Based on the current zoning and physical land constraints, there is potential to develop approximately 35,000 units within the existing Village Areas. The development of these units would result in a VMT related impact of over 1.8 million excess miles of travel. While there are several VMT mitigation strategies, both locally and regionally, that can be implemented to reduce a portion of the excess VMT generated, it will most likely not be feasible to reduce 1.7 million excess miles of VMT within the County. Therefore, it is recommended that the focus be placed on Village Areas that are projected to have an excess VMT of 35 miles or less. This will allow for the feasible mitigation measures to be concentrated in the areas that have the best chance of mitigating their VMT-related impacts. Focusing on the more efficient areas will also ensure that the potential VMT mitigation will be applied in the most efficient ways and will be spread across the highest number of units, instead of potentially being unproportionally allocated to the areas which have the highest impact.

Therefore, the following measures are recommended:

1. Focus on Village Areas who have an excess VMT per unit below 35 miles.
2. Implement affordable housing requirements within the Village Areas. Requiring developments to include 10% of their units as affordable would reduce their VMT impact by 12% and would reduce the overall excess VMT for the focused Village Areas by almost 25,000 miles.

3. Develop a Local VMT Mitigation Program that focuses on implementing VMT reducing infrastructure in the focused Village Areas that could potentially offer grant assistance to existing businesses to implement VMT reducing TDM measures.
4. Work with other jurisdictions to identify the potential for participating in their VMT Mitigations Programs.
5. Continue to pursue a Regional VMT Mitigation Program.

Attachment 3
VMT Analysis

APN	Existing Units	TAZ	CPA	Area	VMT Per Capita	Excess VMT	Proposed Zone	Proposed Density	Unit Potetnial	Net Unit	Population Increase	VMT Impact	VMT Reduction	Reduced VMT	Reduced Excess VMT	Reduced VMT Impact
1057104400	0	816	Fallbrook	6.8	15.88	1.64	VR-2.9	2.9	19	19	53	86.9	0	15.88	1.64	86.92
1043502300	0	732	Fallbrook	2.43	17.29	3.05	VR-4.3	4.3	10	10	28	85.4	0	17.29	3.05	85.4
1043502400	0	732	Fallbrook	2.65	17.29	3.05	VR-4.3	4.3	11	11	31	94.6	0	17.29	3.05	94.55
2371300700	1	3501	North County Metro	10.69	18.64	4.4	VR-4.3	4.3	45	44	122	536.8	0	18.64	4.4	536.8
1062530500	1	887	Fallbrook	2.3	26.09	11.85	VR-4.3	4.3	9	8	22	260.7	0	26.09	11.85	260.7
1062530400	0	887	Fallbrook	1.84	26.09	11.85	VR-4.3	4.3	7	7	19	225.2	0	26.09	11.85	225.15
1062530300	1	887	Fallbrook	3.4	26.09	11.85	VR-4.3	4.3	14	13	36	426.6	0	26.09	11.85	426.6
1062530100	2	887	Fallbrook	4.85	26.09	11.85	VR-4.3	4.3	20	18	50	592.5	0	26.09	11.85	592.5
1862702100	1	3600	Valley Center	0.45	24.97	10.73	VR-4.3	4.3	1	0	0	0	0	24.97	10.73	0
1862702900	1	3600	Valley Center	1.11	24.97	10.73	VR-4.3	4.3	4	3	8	85.8	0	24.97	10.73	85.84
1862702800	1	3600	Valley Center	1.67	24.97	10.73	VR-4.3	4.3	7	6	17	182.4	0	24.97	10.73	182.41
1043502200	1	732	Fallbrook	16.28	17.29	3.05	VR-4.3	4.3	9	8	22	67.1	0	17.29	3.05	67.1
2342100700	0	3521	North County Metro	1.16		2.04	VR-4.3	4.3	4	4	11	22.4	0	16.28	2.04	22.44
2342104800	1	3521	North County Metro	0.99	16.28	2.04	VR-4.3	4.3	4	3	8	16.3	0	16.28	2.04	16.32
2342104900	1	3521	North County Metro	1.02	16.28	2.04	VR-4.3	4.3	4	3	8	16.3	0	16.28	2.04	16.32
2341600700	1	3412	North County Metro	1.84	15.31	1.07	VR-4.3	4.3	7	6	17	18.2	0	15.31	1.07	18.19
2342104600	1	3521	North County Metro	0.96	16.28	2.04	VR-4.3	4.3	4	3	8	16.3	0	16.28	2.04	16.32
2342104700	1	3521	North County Metro	1.09	16.28	2.04	VR-4.3	4.3	4	3	8	16.3	0	16.28	2.04	16.32
2342105000	1	3521	North County Metro	1.3	16.28	2.04	VR-4.3	4.3	5	4	11	22.4	0	16.28	2.04	22.44
2341602500	1	3412	North County Metro	10.74	15.31	1.07	VR-4.3	4.3	46	45	125	133.8	0	15.31	1.07	133.75
3981102700	0	4637	Lakeside	3.89	24	9.76	VR-4.3	4.3	16	16	44	429.4	0	24	9.76	429.44
2341601900	1	3412	North County Metro	0.56	15.31	1.07	VR-4.3	4.3	2	1	3	3.2	0	15.31	1.07	3.21
2341803400	1	3412	North County Metro	0.57	15.31	1.07	VR-4.3	4.3	2	1	3	3.2	0	15.31	1.07	3.21
2341803500	1	3412	North County Metro	0.53	15.31	1.07	VR-4.3	4.3	2	1	3	3.2	0	15.31	1.07	3.21
2341803600	1	3412	North County Metro	0.57	15.31	1.07	VR-4.3	4.3	2	1	3	3.2	0	15.31	1.07	3.21
2341600300	3	3412	North County Metro	1.51	15.31	1.07	VR-4.3	4.3	6	3	8	8.6	0	15.31	1.07	8.56
2341600600	1	3412	North County Metro	1.07	15.31	1.07	VR-4.3	4.3	4	3	8	8.6	0	15.31	1.07	8.56
2341602000	1	3412	North County Metro	0.5	15.31	1.07	VR-4.3	4.3	2	1	3	3.2	0	15.31	1.07	3.21
2341602900	1	3412	North County Metro	2.15	15.31	1.07	VR-4.3	4.3	9	8	22	23.5	0	15.31	1.07	23.54
2341603200	1	3412	North County Metro	2	15.31	1.07	VR-4.3	4.3	8	7	19	20.3	0	15.31	1.07	20.33
2341603300	1	3412	North County Metro	1.4	15.31	1.07	VR-4.3	4.3	6	5	14	15	0	15.31	1.07	14.98
2341603400	1	3412	North County Metro	0.97	15.31	1.07	VR-4.3	4.3	4	3	8	8.6	0	15.31	1.07	8.56
2341603500	2	3412	North County Metro	1.11	15.31	1.07	VR-4.3	4.3	4	2	6	6.4	0	15.31	1.07	6.42
2341603600	1	3412	North County Metro	1.07	15.31	1.07	VR-4.3	4.3	4	3	8	8.6	0	15.31	1.07	8.56
1890920400	1	3793	Valley Center	1.35	24.66	10.42	VR-4.3	4.3	5	4	11	114.6	0	24.66	10.42	114.62
1890922900	1	3793	Valley Center	1.46	24.66	10.42	VR-4.3	4.3	6	5	14	145.9	0	24.66	10.42	145.88
1890923200	1	3793	Valley Center	0.44	24.66	10.42	VR-4.3	4.3	1	0	0	0	0	24.66	10.42	0
1890920600	1	3793	Valley Center	2.89	24.66	10.42	VR-4.3	4.3	12	11	31	323	0	24.66	10.42	323.02
1890923600	1	3793	Valley Center	1.45	24.66	10.42	VR-4.3	4.3	6	5	14	145.9	0	24.66	10.42	145.88
1890923700	1	3793	Valley Center	1.47	24.66	10.42	VR-4.3	4.3	6	5	14	145.9	0	24.66	10.42	145.88
1890923800	1	3793	Valley Center	1.2	24.66	10.42	VR-4.3	4.3	5	4	11	114.6	0	24.66	10.42	114.62
1890924000	1	3793	Valley Center	1.34	24.66	10.42	VR-4.3	4.3	5	4	11	114.6	0	24.66	10.42	114.62

APN	Existing Units	TAZ	CPA	Area	VMT Per Capita	Excess VMT	Proposed Zone	Proposed Density	Unit Potetnial	Net Unit	Population Increase	VMT Impact	VMT Reduction	Reduced VMT	Reduced Excess VMT	Reduced VMT Impact
1890920100	1	3793	Valley Center	1.83	24.66	10.42	VR-4.3	4.3	7	6	17	177.1	0	24.66	10.42	177.14
1890922500	1	3793	Valley Center	1.64	24.66	10.42	VR-4.3	4.3	7	6	17	177.1	0	24.66	10.42	177.14
1890922600	1	3793	Valley Center	0.58	24.66	10.42	VR-4.3	4.3	2	1	3	31.3	0	24.66	10.42	31.26
1890921600	1	3793	Valley Center	3	24.66	10.42	VR-4.3	4.3	12	11	31	323	0	24.66	10.42	323.02
1890910400	1	3793	Valley Center	2.91	24.66	10.42	VR-4.3	4.3	12	11	31	323	0	24.66	10.42	323.02
1890912000	1	3793	Valley Center	0.99	24.66	10.42	VR-4.3	4.3	4	3	8	83.4	0	24.66	10.42	83.36
1890912400	1	3793	Valley Center	0.94	24.66	10.42	VR-4.3	4.3	4	3	8	83.4	0	24.66	10.42	83.36
1890912500	1	3793	Valley Center	1.55	24.66	10.42	VR-4.3	4.3	6	5	14	145.9	0	24.66	10.42	145.88
1890912600	1	3793	Valley Center	0.71	24.66	10.42	VR-4.3	4.3	3	2	6	62.5	0	24.66	10.42	62.52
1890912900	1	3793	Valley Center	0.9	24.66	10.42	VR-4.3	4.3	3	2	6	62.5	0	24.66	10.42	62.52
1890921800	1	3793	Valley Center	3.04	24.66	10.42	VR-4.3	4.3	13	12	33	343.9	0	24.66	10.42	343.86
1890922000	1	3793	Valley Center	3.13	24.66	10.42	VR-4.3	4.3	13	12	33	343.9	0	24.66	10.42	343.86
1890923500	1	3793	Valley Center	2.07	24.66	10.42	VR-4.3	4.3	8	7	19	198	0	24.66	10.42	197.98
1890912700	1	3793	Valley Center	0.54	24.66	10.42	VR-4.3	4.3	2	1	3	31.3	0	24.66	10.42	31.26
1890923400	1	3793	Valley Center	0.99	24.66	10.42	VR-4.3	4.3	4	3	8	83.4	0	24.66	10.42	83.36
2341603800	1	3412	North County Metro	1.2	15.31	1.07	VR-4.3	4.3	5	4	11	11.8	0	15.31	1.07	11.77
5780723600	0	3980	Spring Valley	1.5	16.24	2	VR-4.3	4.3	6	6	17	34	0	16.24	2	34
5780723700	0	3980	Spring Valley	2	16.24	2	VR-4.3	4.3	8	8	22	44	0	16.24	2	44
5780722700	0	4007	Spring Valley	2.73	17.27	3.03	VR-4.3	4.3	11	11	31	93.9	0	17.27	3.03	93.93
2342102700	0	3521	North County Metro	1.26	16.28	2.04	VR-4.3	4.3	5	5	14	28.6	0	16.28	2.04	28.56
2342101200	0	3521	North County Metro	10.21	16.28	2.04	VR-4.3	4.3	43	43	120	244.8	0	16.28	2.04	244.8
2342101100	0	3521	North County Metro	0.59	16.28	2.04	VR-4.3	4.3	2	2	6	12.2	0	16.28	2.04	12.24
2341803300	1	3412	North County Metro	0.49	15.31	1.07	VR-4.3	4.3	2	1	3	3.2	0	15.31	1.07	3.21
2341803200	1	3412	North County Metro	0.35	15.31	1.07	VR-4.3	4.3	1	0	0	0	0	15.31	1.07	0
1890911900	0	3793	Valley Center	1.97	24.66	10.42	VR-4.3	4.3	8	8	22	229.2	0	24.66	10.42	229.24
1890921900	0	3793	Valley Center	2.96	24.66	10.42	VR-4.3	4.3	12	12	33	343.9	0	24.66	10.42	343.86
1890924100	0	3793	Valley Center	1.01	24.66	10.42	VR-4.3	4.3	4	4	11	114.6	0	24.66	10.42	114.62
1890923300	0	3793	Valley Center	1	24.66	10.42	VR-4.3	4.3	4	4	11	114.6	0	24.66	10.42	114.62
1890920800	1	3793	Valley Center	2.88	24.66	10.42	VR-4.3	4.3	12	11	31	323	0	24.66	10.42	323.02
1862801800	0	3600	Valley Center	0.93	24.97	10.73	VR-4.3	4.3	3	3	8	85.8	0	24.97	10.73	85.84
2842440100	0	4697	Ramona	8.55	18.52	4.28	VR-4.3	4.3	36	36	100	428	0	18.52	4.28	428
2842030800	1	4697	Ramona	7.39	18.52	4.28	VR-4.3	4.3	31	30	83	355.2	0	18.52	4.28	355.24
2341604400	1	3412	North County Metro	2.09	15.31	1.07	VR-4.3	4.3	8	7	19	20.3	0	15.31	1.07	20.33
2341603700	1	3412	North County Metro	1.05	15.31	1.07	VR-4.3	4.3	4	3	8	8.6	0	15.31	1.07	8.56
2341604500	1	3412	North County Metro	1.17	15.31	1.07	VR-4.3	4.3	5	4	11	11.8	0	15.31	1.07	11.77
5701204100	0	3406	Sweetwater	2.59	16.75	2.51	VR-4.3	4.3	11	11	31	77.8	0	16.75	2.51	77.81
2341604200	1	3412	North County Metro	0.49	15.31	1.07	VR-4.3	4.3	2	1	3	3.2	0	15.31	1.07	3.21
2341604300	1	3412	North County Metro	0.82	15.31	1.07	VR-4.3	4.3	3	2	6	6.4	0	15.31	1.07	6.42
2341604600	1	3412	North County Metro	1.08	15.31	1.07	VR-4.3	4.3	4	3	8	8.6	0	15.31	1.07	8.56
3981108100	0	4637	Lakeside	10.4	24	9.76	VR-4.3	4.3	44	44	122	1190.7	0	24	9.76	1190.72
1862800500	0	3600	Valley Center	1.86	24.97	10.73	VR-4.3	4.3	7	7	19	203.9	0	24.97	10.73	203.87
2342318200	2	3508	North County Metro	2.08	18.32	4.08	VR-4.3	4.3	8	6	17	69.4	0	18.32	4.08	69.36

APN	Existing Units	TAZ	CPA	Area	VMT Per Capita	Excess VMT	Proposed Zone	Proposed Density	Unit Potetnial	Net Unit	Population Increase	VMT Impact	VMT Reduction	Reduced VMT	Reduced Excess VMT	Reduced VMT Impact
2342318100	1	3508	North County Metro	2	18.32	4.08	VR-4.3	4.3	8	7	19	77.5	0	18.32	4.08	77.52
2342310100	0	3508	North County Metro	10.1	18.32	4.08	VR-4.3	4.3	43	43	120	489.6	0	18.32	4.08	489.6
3981107200	0	4637	Lakeside	1.74	24	9.76	VR-4.3	4.3	7	7	19	185.4	0	24	9.76	185.44
1890912800	1	3793	Valley Center	1.01	24.66	10.42	VR-4.3	4.3	4	3	8	83.4	0	24.66	10.42	83.36
1063404500	2	1098	Fallbrook	2.33	19.12	4.88	VR-7.3	7.3	17	15	42	205	0	19.12	4.88	204.96
3942902800	2	4533	Lakeside	16.65	17.8	3.56	VR-7.3	7.3	121	119	331	1178.4	0	17.8	3.56	1178.36
3944210200	1	4533	Lakeside	0.67	17.8	3.56	VR-7.3	7.3	4	3	8	28.5	0	17.8	3.56	28.48
3944210300	1	4533	Lakeside	1.5	17.8	3.56	VR-7.3	7.3	10	9	25	89	0	17.8	3.56	89
3944210400	1	4533	Lakeside	3.47	17.8	3.56	VR-7.3	7.3	25	24	67	238.5	0	17.8	3.56	238.52
3921500900	1	4594	Lakeside	10.17	21.59	7.35	VR-7.3	7.3	74	73	203	1492.1	0	21.59	7.35	1492.05
1063404400	1	1098	Fallbrook	2.02	19.12	4.88	VR-7.3	7.3	14	13	36	175.7	0	19.12	4.88	175.68
1063404600	1	1098	Fallbrook	1.8	19.12	4.88	VR-7.3	7.3	13	12	33	161	0	19.12	4.88	161.04
3820400300	1	4413	Lakeside	2.39	14.73	0.49	VR-7.3	7.3	17	16	44	21.6	0	14.73	0.49	21.56
3822102400	1	4413	Lakeside	1.54	14.73	0.49	VR-7.3	7.3	11	10	28	13.7	0	14.73	0.49	13.72
5051402000	0	4196	Spring Valley	1.16	17.13	2.89	VR-7.3	7.3	8	8	22	63.6	0	17.13	2.89	63.58
3981203000	2	4671	Lakeside	16.46	21.65	7.41	VR-7.3	7.3	120	118	328	2430.5	0	21.65	7.41	2430.48
3822102500	1	4413	Lakeside	1.57	14.73	0.49	VR-7.3	7.3	11	10	28	13.7	0	14.73	0.49	13.72
3822100800	1	4413	Lakeside	1.75	14.73	0.49	VR-7.3	7.3	12	11	31	15.2	0	14.73	0.49	15.19
3822102600	0	4413	Lakeside	1.75	14.73	0.49	VR-7.3	7.3	12	12	33	16.2	0	14.73	0.49	16.17
3822104300	1	4413	Lakeside	0.93	14.73	0.49	VR-7.3	7.3	6	5	14	6.9	0	14.73	0.49	6.86
3822104400	0	4413	Lakeside	1.03	14.73	0.49	VR-7.3	7.3	7	7	19	9.3	0	14.73	0.49	9.31
3822102700	0	4413	Lakeside	1.31	14.73	0.49	VR-7.3	7.3	9	9	25	12.3	0	14.73	0.49	12.25
3944210500	0	4533	Lakeside	4.07	17.8	3.56	VR-7.3	7.3	29	29	81	288.4	0	17.8	3.56	288.36
3822103400	0	4413	Lakeside	3.68	14.73	0.49	VR-7.3	7.3	26	26	72	35.3	0	14.73	0.49	35.28
3822103600	0	4413	Lakeside	3.51	14.73	0.49	VR-7.3	7.3	25	25	70	34.3	0	14.73	0.49	34.3
3950142400	0	4594	Lakeside	10.47	21.59	7.35	VR-7.3	7.3	76	76	211	1550.9	0	21.59	7.35	1550.85
1890126000	0	3802	Valley Center	5.32	27.46	13.22	VR-7.3	7.3	38	38	106	1401.3	0	27.46	13.22	1401.32
1892811800	0	3802	Valley Center	2.48	27.46	13.22	VR-7.3	7.3	18	18	50	661	0	27.46	13.22	661
1890125900	0	3802	Valley Center	12.31	27.46	13.22	VR-7.3	7.3	89	89	247	3265.3	0	27.46	13.22	3265.34
1890128900	0	3948	Valley Center	27.36	29.53	15.29	VR-7.3	7.3	199	199	553	8455.4	0	29.53	15.29	8455.37
1890128700	0	3802	Valley Center	8.16	27.46	13.22	VR-7.3	7.3	59	59	164	2168.1	0	27.46	13.22	2168.08
1250507700	0	1957	Fallbrook	6.05	33.77	19.53	VR-10.9	10.9	65	65	181	3534.9	0.044	32.28	18.04	3265.24
1250903800	0	1930	Fallbrook	14.78	36.6	22.36	VR-10.9	10.9	161	161	448	10017.3	0.044	34.99	20.75	9296
1250902600	0	1930	Fallbrook	7.07	36.6	22.36	VR-10.9	10.9	77	77	214	4785	0.044	34.99	20.75	4440.5
1250903500	0	1930	Fallbrook	3.27	36.6	22.36	VR-10.9	10.9	35	35	97	2168.9	0.044	34.99	20.75	2012.75
3981800200	1	4593	Lakeside	6.88	21.38	7.14	VR-10.9	10.9	74	73	203	1449.4	0.044	20.44	6.2	1258.6
1250507600	0	1957	Fallbrook	3.27	33.77	19.53	VR-10.9	10.9	35	35	97	1894.4	0.044	32.28	18.04	1749.88
4001304100	0	4617	Lakeside	1.42	22.47	8.23	VR-15	15	21	21	58	477.3	0.143	19.26	5.02	291.16
4001304700	0	4617	Lakeside	4.82	22.47	8.23	VR-15	15	72	72	200	1646	0.143	19.26	5.02	1004
4001304600	1	4617	Lakeside	2.51	22.47	8.23	VR-15	15	37	36	100	823	0.143	19.26	5.02	502
4001304800	1	4617	Lakeside	1.81	22.47	8.23	VR-15	15	27	26	72	592.6	0.143	19.26	5.02	361.44
5643104000	0	3402	Sweetwater	0.92	15.96	1.72	VR-15	15	13	13	36	61.9	0.143	13.68	0	0

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5643104100	0	3402	Sweetwater	0.98	15.96	1.72	VR-15	15	14	14	39	67.1	0.143	13.68	0	0
5781423500	0	3980	Spring Valley	4.79	16.24	2	VR-15	15	71	71	197	394	0.143	13.92	0	0
1882311900	0	3817	Valley Center	2.68	30.62	16.38	VR-15	15	40	40	111	1818.2	0.143	26.24	12	1332
2822810100	0	4674	Ramona	2.96	21.62	7.38	VR-15	15	44	44	122	900.4	0.143	18.53	4.29	523.38
2822810200	0	4674	Ramona	4	21.62	7.38	VR-15	15	60	60	167	1232.5	0.143	18.53	4.29	716.43
2822810300	0	4674	Ramona	5	21.62	7.38	VR-15	15	75	75	209	1542.4	0.143	18.53	4.29	896.61
2822820100	0	4674	Ramona	3.51	21.62	7.38	VR-15	15	52	52	145	1070.1	0.143	18.53	4.29	622.05
2822820200	0	4674	Ramona	4.4	21.62	7.38	VR-15	15	66	66	183	1350.5	0.143	18.53	4.29	785.07
2822820300	0	4674	Ramona	4.92	21.62	7.38	VR-15	15	73	73	203	1498.1	0.143	18.53	4.29	870.87
2822820400	0	4674	Ramona	4.98	21.62	7.38	VR-15	15	74	74	206	1520.3	0.143	18.53	4.29	883.74
2822820500	0	4674	Ramona	5	21.62	7.38	VR-15	15	75	75	209	1542.4	0.143	18.53	4.29	896.61
2822820600	0	4674	Ramona	4.51	21.62	7.38	VR-15	15	67	67	186	1372.7	0.143	18.53	4.29	797.94
4033704800	1	4777	Alpine	1.72	27.56	13.32	VR-15	15	25	24	67	892.4	0.143	23.62	9.38	628.46
1890942103	1	3814	Valley Center	5.23	26.21	11.97	VR-15	15	78	77	214	2561.6	0.143	22.46	8.22	1759.08
4001304900	0	4617	Lakeside	2.4	22.47	8.23	VR-15	15	36	36	100	823	0.143	19.26	5.02	502
1882313700	0	3817	Valley Center	1.57	30.62	16.38	VR-15	15	23	23	64	1048.3	0.143	26.24	12	768
1862301600	1	3692	Valley Center	2.32	27.38	13.14	VR-20	20	46	45	125	1642.5	0.264	20.15	5.91	738.75
2823700100	1	4665	Ramona	1.41	16.68	2.44	VR-20	20	28	27	75	183	0.264	12.28	0	0
1862301800	1	3692	Valley Center	1.04	27.38	13.14	VR-20	20	20	19	53	696.4	0.264	20.15	5.91	313.23
1862301900	1	3692	Valley Center	1.02	27.38	13.14	VR-20	20	20	19	53	696.4	0.264	20.15	5.91	313.23
1862305100	1	3692	Valley Center	2.33	27.38	13.14	VR-20	20	46	45	125	1642.5	0.264	20.15	5.91	738.75
1862307600	1	3692	Valley Center	0.66	27.38	13.14	VR-20	20	13	12	33	433.6	0.264	20.15	5.91	195.03
1862304000	0	3692	Valley Center	0.45	27.38	13.14	VR-20	20	9	9	25	328.5	0.264	20.15	5.91	147.75
2823700200	0	4665	Ramona	5.12	16.68	2.44	VR-20	20	102	102	284	693	0.264	12.28	0	0
2823702000	0	4665	Ramona	3.1	16.68	2.44	VR-20	20	62	62	172	419.7	0.264	12.28	0	0
2823701900	0	4665	Ramona	4.71	16.68	2.44	VR-20	20	94	94	261	636.8	0.264	12.28	0	0
2822610600	1	4665	Ramona	4.18	16.68	2.44	VR-20	20	83	82	228	556.3	0.264	12.28	0	0
1862302200	1	3692	Valley Center	3.05	27.38	13.14	VR-20	20	61	60	167	2194.4	0.264	20.15	5.91	986.97
1862308400	0	3692	Valley Center	0.12	27.38	13.14	VR-20	20	2	2	6	78.8	0.264	20.15	5.91	35.46
1862302000	1	3692	Valley Center	0.86	27.38	13.14	VR-20	20	17	16	44	578.2	0.264	20.15	5.91	260.04
1862306400	0	3692	Valley Center	6.69	27.38	13.14	VR-20	20	133	133	370	4861.8	0.264	20.15	5.91	2186.7
1862400500	1	3692	Valley Center	0.96	27.38	13.14	VR-20	20	19	18	50	657	0.264	20.15	5.91	295.5
1862400400	2	3692	Valley Center	1.03	27.38	13.14	VR-20	20	20	18	50	657	0.264	20.15	5.91	295.5
5031922400	1	3975	Spring Valley	1.23	15.45	1.21	VR-24	24	29	28	78	94.4	0.3	10.82	0	0
5031921100	1	3975	Spring Valley	0.72	15.45	1.21	VR-24	24	17	16	44	53.2	0.3	10.82	0	0
2822613400	0	4665	Ramona	2.29	16.68	2.44	VR-24	24	54	54	150	366	0.3	11.68	0	0
1043502100	0	801	Fallbrook	3.81	19.07	4.83	VCMU	30	114	114	317	1531.1	0.3	13.35	0	0
1043501000	0	732	Fallbrook	1.15	17.29	3.05	VCMU	30	34	34	95	289.8	0.3	12.1	0	0
1042503500	1	801	Fallbrook	2.56	19.07	4.83	VCMU	30	76	75	209	1009.5	0.3	13.35	0	0
1043503000	0	801	Fallbrook	1.33	19.07	4.83	VCMU	30	39	39	108	521.6	0.3	13.35	0	0
1042503400	1	801	Fallbrook	4.18	19.07	4.83	VCMU	30	125	124	345	1666.4	0.3	13.35	0	0
1890913800	0	3793	Valley Center	0.82	24.66	10.42	VCMU	30	24	24	67	698.1	0.3	17.26	3.02	202.34

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2821913200	1	4625	Ramona	1.14	22.64	8.4	VCMU	30	34	33	92	772.8	0.3	15.85	1.61	148.12
2821913000	1	4625	Ramona	1.01	22.64	8.4	VCMU	30	30	29	81	680.4	0.3	15.85	1.61	130.41
2822010100	1	4633	Ramona	0.88	17.04	2.8	VCMU	30	26	25	70	196	0.3	11.93	0	0
2822010200	0	4633	Ramona	0.87	17.04	2.8	VCMU	30	26	26	72	201.6	0.3	11.93	0	0
4032911000	1	4802	Alpine	0.3	24.25	10.01	VCMU	30	9	8	22	220.2	0.3	16.98	2.74	60.28
4032911100	3	4802	Alpine	0.67	24.25	10.01	VCMU	30	20	17	47	470.5	0.3	16.98	2.74	128.78
4032911200	3	4802	Alpine	0.39	24.25	10.01	VCMU	30	11	8	22	220.2	0.3	16.98	2.74	60.28
4032911400	1	4802	Alpine	0.38	24.25	10.01	VCMU	30	11	10	28	280.3	0.3	16.98	2.74	76.72
4032913200	2	4802	Alpine	0.25	24.25	10.01	VCMU	30	7	5	14	140.1	0.3	16.98	2.74	38.36
4032913600	2	4802	Alpine	0.64	24.25	10.01	VCMU	30	19	17	47	470.5	0.3	16.98	2.74	128.78
4032912900	1	4802	Alpine	0.55	24.25	10.01	VCMU	30	16	15	42	420.4	0.3	16.98	2.74	115.08
4032910800	1	4802	Alpine	0.46	24.25	10.01	VCMU	30	13	12	33	330.3	0.3	16.98	2.74	90.42
4032910900	1	4802	Alpine	0.26	24.25	10.01	VCMU	30	7	6	17	170.2	0.3	16.98	2.74	46.58
4033101000	1	4802	Alpine	1.67	24.25	10.01	VCMU	30	50	49	136	1361.4	0.3	16.98	2.74	372.64
4033101100	1	4802	Alpine	0.22	24.25	10.01	VCMU	30	6	5	14	140.1	0.3	16.98	2.74	38.36
5051402200	1	4196	Spring Valley	2.34	17.13	2.89	VCMU	30	70	69	192	554.9	0.3	11.99	0	0
5060202600	0	4434	Valle De Oro	1.7	16.32	2.08	VCMU	30	51	51	142	295.4	0.3	11.42	0	0
2821913600	1	4625	Ramona	0.91	22.64	8.4	VCMU	30	27	26	72	604.8	0.3	15.85	1.61	115.92
4032913000	0	4802	Alpine	0.53	24.25	10.01	VCMU	30	15	15	42	420.4	0.3	16.98	2.74	115.08
4032913100	0	4802	Alpine	0.84	24.25	10.01	VCMU	30	25	25	70	700.7	0.3	16.98	2.74	191.8
1882604900	0	3761	Valley Center	4.99	23.88	9.64	VCMU	30	149	149	414	3991	0.3	16.72	2.48	1026.72
1882605000	0	3761	Valley Center	6.63	23.88	9.64	VCMU	30	198	198	550	5302	0.3	16.72	2.48	1364
1890913500	0	3793	Valley Center	0.12	24.66	10.42	VCMU	30	3	3	8	83.4	0.3	17.26	3.02	24.16
1890913600	1	3793	Valley Center	0.32	24.66	10.42	VCMU	30	9	8	22	229.2	0.3	17.26	3.02	66.44
1890913200	1	3793	Valley Center	0.23	24.66	10.42	VCMU	30	6	5	14	145.9	0.3	17.26	3.02	42.28
1890913100	0	3793	Valley Center	0.12	24.66	10.42	VCMU	30	3	3	8	83.4	0.3	17.26	3.02	24.16
1890911200	0	3793	Valley Center	0.64	24.66	10.42	VCMU	30	19	19	53	552.3	0.3	17.26	3.02	160.06
1862700500	0	3692	Valley Center	0.39	27.38	13.14	VCMU	30	11	11	31	407.3	0.3	19.17	4.93	152.83
1862700400	0	3692	Valley Center	0.33	27.38	13.14	VCMU	30	9	9	25	328.5	0.3	19.17	4.93	123.25
1890128400	0	3793	Valley Center	3.78	24.66	10.42	VCMU	30	113	113	314	3271.9	0.3	17.26	3.02	948.28
1264520100	0	1138	Bonsall	1.36	27.26	13.02	VR-30	30	40	40	111	1445.2	0.3	19.08	4.84	537.24
1262302200	2	1138	Bonsall	2.52	27.26	13.02	VR-30	30	75	73	203	2643.1	0.3	19.08	4.84	982.52
1262305500	0	1138	Bonsall	4.52	27.26	13.02	VR-30	30	135	135	375	4882.5	0.3	19.08	4.84	1815
1860933900	0	2654	Hidden Meadows	7.3	27.88	13.64	VCMU	30	219	219	609	8306.8	0.3	19.52	5.28	3215.52
5060202500	0	4434	Valle De Oro	1.2	16.32	2.08	VCMU	30	36	36	100	208	0.3	11.42	0	0
5060203500	0	4353	Valle De Oro	4.1	0	0	VR-30	30	123	123	342	0	0.3	0	0	0
2821912800	0	4625	Ramona	0.95	22.64	8.4	VCMU	30	28	28	78	655.2	0.3	15.85	1.61	125.58
2821912900	1	4625	Ramona	0.89	22.64	8.4	VCMU	30	26	25	70	588	0.3	15.85	1.61	112.7
2821913100	0	4625	Ramona	0.94	22.64	8.4	VCMU	30	28	28	78	655.2	0.3	15.85	1.61	125.58
2821913300	0	4625	Ramona	0.95	22.64	8.4	VCMU	30	28	28	78	655.2	0.3	15.85	1.61	125.58
2821913400	0	4625	Ramona	0.97	22.64	8.4	VCMU	30	29	29	81	680.4	0.3	15.85	1.61	130.41
2821913500	0	4625	Ramona	0.98	22.64	8.4	VCMU	30	29	29	81	680.4	0.3	15.85	1.61	130.41

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2822010300	0	4633	Ramona	0.91	17.04	2.8	VCMU	30	27	27	75	210	0.3	11.93	0	0
2822010400	0	4633	Ramona	0.86	17.04	2.8	VCMU	30	25	25	70	196	0.3	11.93	0	0
2822010500	0	4633	Ramona	0.96	17.04	2.8	VCMU	30	28	28	78	218.4	0.3	11.93	0	0
2822020100	0	4633	Ramona	0.88	17.04	2.8	VCMU	30	26	26	72	201.6	0.3	11.93	0	0
2822020400	0	4633	Ramona	1.83	17.04	2.8	VCMU	30	54	54	150	420	0.3	11.93	0	0
2822020600	1	4633	Ramona	0.45	17.04	2.8	VCMU	30	13	12	33	92.4	0.3	11.93	0	0
2822020500	0	4633	Ramona	1.21	17.04	2.8	VCMU	30	36	36	100	280	0.3	11.93	0	0
1862703100	1	3692	Valley Center	0.73	27.38	13.14	VCMU	30	21	20	56	735.8	0.3	19.17	4.93	276.08
1882310900	0	3817	Valley Center	13.13	30.62	16.38	VCMU	30	393	393	1093	17903.3	0.3	21.43	7.19	7858.67
2821912700	2	4625	Ramona	1.02	22.64	8.4	VCMU	30	30	28	78	655.2	0.3	15.85	1.61	125.58
1890911300	0	3793	Valley Center	0.62	24.66	10.42	VCMU	30	18	18	50	521	0.3	17.26	3.02	151
1890912100	1	3793	Valley Center	0.28	24.66	10.42	VCMU	30	8	7	19	198	0.3	17.26	3.02	57.38
1250610100	0	2138	Fallbrook	96.03	0	0	VCMU	30	2880	2880	8006	0	0.3	0	0	0
1262305700	0	1138	Bonsall	27.05	27.26	13.02	VR-30	30	811	811	2255	29360.1	0.3	19.08	4.84	10914.2
3981101000	0	4658	Lakeside	3.93	20.82	6.58	VCMU	30	117	117	325	2138.5	0.3	14.57	0.33	107.25
3981100900	0	4658	Lakeside	5.04	20.82	6.58	VCMU	30	151	151	420	2763.6	0.3	14.57	0.33	138.6
1882314600	0	3817	Valley Center	1.48	30.62	16.38	VCMU	30	44	44	122	1998.4	0.3	21.43	7.19	877.18
1882314500	0	3817	Valley Center	0.44	30.62	16.38	VCMU	30	13	13	36	589.7	0.3	21.43	7.19	258.84
1882314400	0	3817	Valley Center	4.94	30.62	16.38	VCMU	30	148	148	411	6732.2	0.3	21.43	7.19	2955.09
1882314200	0	3817	Valley Center	1.71	30.62	16.38	VCMU	30	51	51	142	2326	0.3	21.43	7.19	1020.98
1882314300	0	3817	Valley Center	2.7	30.62	16.38	VCMU	30	81	81	225	3685.5	0.3	21.43	7.19	1617.75
1882314100	0	3817	Valley Center	2.66	30.62	16.38	VCMU	30	79	79	220	3603.6	0.3	21.43	7.19	1581.8
1890128500	0	3793	Valley Center	0.89	24.66	10.42	VCMU	30	26	26	72	750.2	0.3	17.26	3.02	217.44
1890913700	0	3793	Valley Center	2.85	24.66	10.42	VCMU	30	85	85	236	2459.1	0.3	17.26	3.02	712.72
4032913500	1	4802	Alpine	0.39	24.25	10.01	VCMU	30	11	10	28	280.3	0.3	16.98	2.74	76.72