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Land Use Modification in an Urban Setting

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Land Use Modification in an Urban Setting

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Introduction

Conflicting land uses are an integral aspect of planning and development in an urban environment. This paper examines the methodology used in evaluating the economic impact associated with changing the zoning designation of land from industrial to commercial use. The case study is a 20-acre parcel within the City of San Diego, California. Originally zoned as industrial property, at the time of the study, the site housed a small warehouse operation that employed some six to eight employees with an annual payroll of \$280,000. Some political and community activists were hoping for the development of the parcel into a manufacturing operation with a large number of high wage jobs. The non-profit Jacobs Foundation bought the site with the intention of developing the property into commercial and office space. One of the conditions imposed by the City of San Diego in considering the request for rezoning the space was a comprehensive economic impact analysis.

This paper identifies the methodology employed in the impact analysis and provides some of the highlights of the study. There were several reasons to conclude that the development of the site into an industrial development with a large number of jobs was unlikely. The property is located near a flood zone and within a residential neighborhood with limited transportation avenues. Furthermore, the site is only 20 acres, and isolated from other manufacturing hubs. Finally, the overall number of jobs is trending downward for both the United States as a whole as well as in San Diego. In evaluating the benefits from the rezoning, the author estimates that in addition to the infusion of jobs and expenditures resulting from the construction aspect of the project (360 jobs and \$50 million), the development of the site as commercial/office space will eventually support an estimated 1790 jobs with an annual payroll of almost \$50 million. Sales revenue in the proposed development is forecast to exceed \$25 million annually. In

both the construction and operation of Market Creek Plaza, the Jacobs Foundation worked to assure local access to jobs and training opportunities. These benefits are more difficult to quantify, but are probably of even greater importance to the community. In addition, the study demonstrates that the study area was under-served in terms of food stores and other retail shops. It is estimated that at least \$60 million of spending on retail sales by study area residents was occurring outside of the study area. A significant portion of this spending, and the subsequent tax dollars, were benefiting municipalities other than the City of San Diego. Market Creek Plaza serves to fill this void. The City of San Diego accepted the economic impact analysis along with other detailed analyses, and approved the change in zoning. The development is complete and has been cited throughout the United States for its success.

Executive Summary

On balance, changing the land use designation on the Langley parcel and allowing the development of the Market Creek Plaza project will generate positive economic benefits for the “Diamond” neighborhoods of San Diego (Lincoln Park, Chollas View, Emerald Hills and Valencia Park). This report supports this conclusion based on the following analyses:

1. At the time of purchase by the Jacobs Foundation, the property supported 6-8 jobs with an annual wage bill of approximately \$280,000. Property taxes amounted to \$8700 per year. In addition to the infusion of jobs and expenditures resulting from the construction aspect of the project (360 jobs and \$50 million), Market Creek Plaza will eventually support an estimated 1790 jobs with an annual payroll of almost \$50 million. Sales revenue in the proposed development is forecast to exceed \$25 million annually. In both the construction and operation of Market Creek Plaza, the Jacobs Foundation will be working to assure local access to jobs and training opportunities. These benefits are more difficult to quantify, but are probably of even greater importance to the community.
2. There has been virtually no new development in industrial property in the study area over the past ten years. The existing developed industrial property in the study area is severely under-utilized. The one exception is the Gateway Center Projects developed by the Southeastern Economic Development Corporation (SEDC). SEDC is currently preparing an additional parcel (Valencia Palms Industrial Park) for industrial development. SEDC is undertaking significant site preparation at this property due to its position in a flood plain. Without this preparation, it is doubtful whether its development would be feasible. In addition, the Valencia Palms project is in the heart of a residential area, creating potential access and transportation issues. The study property also faces similar constraints. Significant site preparation is required due to the flood plain associated with Chollas Creek, and the site will require extensive traffic mitigation efforts. These factors combine to make independent industrial development of the study property unlikely.
3. National employment trends indicate that although some 17 million jobs will be created in the next ten years, employment in manufacturing industries is expected

- to fall by 350,000 jobs. Over the next 20 years, the manufacturing sector at the regional level is forecast to be the slowest growing sector, creating 12,000 new jobs. The majority of development in industrial property will be coming from areas in the County outside the City of San Diego. This implies that what little growth there will be in high quality manufacturing jobs will be occurring outside of the study area.
4. The study area is currently under-served in terms of food stores and other retail shops. It is estimated that at least \$60 million of spending on retail sales by study area residents is occurring outside of the study area. A significant portion of this spending, and the subsequent tax dollars, are benefiting the cities of Lemon Grove and National City. Market Creek Plaza will serve to fill this void.

Background

The Market Creek Plaza site is comprised of two parcels. At 17.93 acres, the larger parcel is known as the Langley Property from past operations of the Langley Corporation on the site. At the time of purchase by the Jacobs Center, the Langley Property contained an 82,000 square-foot industrial manufacturing building built in 1960 as well as a parking lot. Langley Corporation was a manufacturer of heavy-duty metal cabinets that house sophisticated electronics. Langley Corporation was acquired in 1989 by Fleet Aerospace Corporation of St. Catharines, Ontario, Canada. Employment levels for the property at the time of purchase are estimated to be approximately 100 manufacturing and lower level management positions. By 1991, Fleet Aerospace was in considerable financial distress resulting from unsuccessful expansion during the 1980's. By 1994, Fleet had sold off most of the precision machining equipment used by Fleet's Langley Division to Pneumafil Corporation of Charlotte, North Carolina. In addition, Pneumafil hired key technical and manufacturing employees from the Langley Division. Fleet Aerospace sold the Langley property to the Jacobs Center in 1988. At the time of sale, the site is estimated to have supported 6-8 jobs with an annual payroll of approximately \$280,000. At 1.63 acres, the smaller parcel contains a parking lot and industrial storage building. There are no current jobs associated with the smaller parcel. During 1998, these two properties contributed \$8700 in property taxes to the City of San Diego.

The Study Area

The Market Creek Plaza project stands at the intersection of four different census tracts. In addition, a fifth census tract lies just a short distance to the southeast. These five census tracts (30.01, 31.01, 31.02, 33.00 and 34.02) provide the data for this analysis. These census tracts correspond roughly to the following neighborhoods: 30.01 – Emerald Hills, 31.01 and 31.02 – Valencia Park, 33.00 – Lincoln Park, and 34.02 – Chollas View. The map on page 22 shows the relationship between Market Creek Plaza, the five census tracts, and the corresponding neighborhoods. Table 1 presents the San Diego Association of Governments (SANDAG) 1997 estimates of household median income, population and land area by census tract. Incomes vary dramatically over this area, with a median household income of \$21,474 in the Lincoln Park neighborhood to an estimated \$41,536 for households in Emerald Hills neighborhood. The study area has a population of approximately 46,000 people over an area of 3700 acres.

Table 1
Median Income by Census Tract, 1997

Census Tract	Median Income	Number of Households	Number of Persons	Area Acres	Area Sq. miles
3001	\$41,536	1,198	4,106	577.74	0.9
3101	36,969	1,051	3,535	295.51	0.4
3102	39,896	3,771	15,052	1110.48	1.7
3300	21,474	4,251	14,628	998.39	1.6
3402	24,118	2,165	8,917	736.95	1.1
Total		12,436	46,238	3719.07	5.7

SANDAG estimate

Table 2
Population Age Distribution, 1997

Census Tract	3001	3101	3102	3300	3402
0-4 years	352	317	1450	2004	1020
5-9	334	283	1417	1743	930
10-14	331	269	1384	1492	899
15-19	334	257	1312	1292	851
20-24	331	245	1221	1193	796
25-29	311	234	1109	1132	713
30-34	299	232	1118	1075	660
35-39	283	225	1170	973	603
40-44	272	212	1124	825	517
45-49	246	190	944	636	417
50-54	225	176	725	493	335
55-59	200	176	460	385	250
60-64	171	215	448	331	278
65-69	151	201	392	324	206
70-74	111	137	234	255	163
75 and over	155	169	236	475	170
Total	4106	3535	15052	14628	8917

SANDAG estimate

Table 2 contains the breakdown of this population by each census tract and age category. In general, the population in the study area is considerably younger than the general population in San Diego County. For instance, in census tract 33.00, over 44% of the population is under the age of 20 years, while for the county as a whole the rate is only 21%.

Table 3
Population Characteristics, 1990

Census Tract	3001	3101	3102	3300	3402
White	666	351	2636	1865	1126
Black	2525	2546	5230	7389	3087
Indian	18	15	80	62	61
Asian	208	159	4948	1313	1842
Other	579	361	1608	3045	2579
Persons	3996	3432	14502	13674	8695
Hispanic	1003	603	3131	4558	3646
Owner occupied	883	877	2498	1256	799
Renter occupied	311	169	1232	2826	1365
High Mortgage	30.7	26.6	45.7	30.6	34.3
High Rent	49.2	45	60.6	62.8	59.4
Minority	3665	3262	12966	12969	8336
Poverty	557	339	2004	5472	2962
% high school	71.9	68	68.7	58.9	44.8
% bachelor degree	11.1	6.9	13.6	5.7	6.0

Census Bureau

Table 3 is based on data from the 1990 Census and contains additional information regarding the racial and ethnic composition of the study area as well as some economic indicators. The population is approximately 14% White, 47% African-American, 0.5% Native-American and 18% Asian. Approximately 29% of the population identify themselves as being Hispanic. 52% of all households own the dwelling in which they reside, slightly above the City of San Diego average of 48.3%. The categories High Mortgage and High Rent in Table 3 refer to the percentage of households for which the mortgage payment or monthly rent obligation represents more than 30% of household income. More than 36% of all households that own their own home in the study area fall into this category. More than 60% of all renters also exceed this threshold.

SANDAG also tracks employment levels at the census tract level. Table 4 contains estimates of the numbers of job by sector for 1990 and 1995. The employment estimates come from information provided by Equifax, which conducts address specific employment counts each year. Census tract 33.00 and 34.02 both showed job growth over the period of approximately 350 new jobs (this despite losing 100 jobs from the phased closure of the Langley plant). Over the same period, the remaining three census tracts lost approximately 745 jobs. 452 of the lost jobs were in manufacturing, with

Table 4
Employment by Industry at Place of Work, 1990 and 1995

Census Tract Year	3001		3101		3102		3300		3402	
	1990	1995	1990	1995	1990	1995	1990	1995	1990	1995
Agriculture, mining	0	0	0	0	4	0	0	0	0	0
Construction	4	10	103	2	140	125	9	24	153	399
Manufacturing	118	88	0	0	1	1	98	14	860	522
Transportation, Communication, Utilities	13	11	5	0	0	35	46	8	397	260
Wholesale trade	39	38	0	0	44	1	12	18	290	396
Retail trade	83	33	128	0	155	98	29	212	354	239
Finance, Insurance, Real Estate	8	6	0	0	29	10	70	180	32	38
Services	57	34	72	30	133	435	805	502	375	617
Government	57	92	0	0	353	462	762	550	714	746
Uniformed military	0	0	0	0	0	0	0	0	0	0
Self-employed	44	21	21	11	118	107	192	146	167	178
Total	423	333	329	43	977	1274	2023	1654	3342	3395

SANDAG estimate

Table 5
Employment and Unemployment, 1995

Census Tract	3001	3101	3102	3300	3402
Male					
Armed forces	50	38	354	63	44
Civilian Employment	918	727	2875	2344	1499
Civilian Unemployment	114	92	304	319	274
Not in Labor Force	372	358	1247	1105	828
Female					
Armed forces	0	9	25	9	0
Civilian Employment	752	657	2674	1825	1174
Civilian Unemployment	87	99	222	319	164
Not in Labor Force	682	342	2175	2797	1553
Total civilian labor force					
Employed	1670	1384	5549	4169	2673
Unemployed	201	191	526	638	438
Total	1871	1575	6075	4807	3111
Unemployment Rate	10.74	12.13	8.66	13.27	14.08

SANDAG estimate

another 147 jobs lost in transportation, communication and utilities. Table 5 presents SANDAG estimates of employment for the study area for 1995. Unemployment for the overall area was 11.4%, well above the average of 6.5% for the City of San Diego.

During the past ten years, there has been virtually no new development of industrial property in the study area. The one notable exception to this is the Gateway Center projects under the aegis of the Southeastern Economic Development Corporation (SEDC). Gateway Center East is a 61 acre, mixed-use development consisting of 507,000 square feet of industrial space, 90,000 square feet of retail (Costco), and a 40,000 square foot medical building. There are currently 27 businesses operating in Gateway Center East with employment estimated at 1360 employees, most involved in light manufacturing. Gateway Center West covers 59 acres consisting of 24.5 acres of industrial development, 16 acres devoted to San Diego Gas and Electric, 11 acres of public right-of-way, and 4.25 acres of residential development. Current employment at Gateway Center West is approximately 1100 employees. SEDC is currently working to prepare the “Potter” tract for development. This 13-acre parcel, near the intersection of Valencia Parkway and Imperial Avenue, is slated to be developed as Valencia Palms Industrial Park. The Langley parcel has similar constraints on development in that a portion of the property lies on a flood plan.

Appendix 1A contains a detailed listing of businesses and their corresponding employment levels within a two-mile radius of the study property. This information was assembled from business directories, telephone directories and visual inspection. It includes businesses along the main commercial arteries of Euclid Avenue, Market Street, Federal Boulevard, Imperial Avenue and Gateway Center East. The largest employers are Angelica Textile Services and Mountain High Knitting, each with between 250 and 499 employees. Somewhere between 569 and 1184 workers are employed in manufacturing jobs in businesses identified by this list. Not surprisingly, these manufacturing jobs encompass a wide range of skill levels and wages. The largest concentration of employees, with between 350 and 666 workers, is in the manufacturing of luggage and textiles. The second highest concentration is in the production of wood partitions and products. There does not appear to be any identifiable cluster of manufacturing jobs in the study area, nor do the types of existing manufacturing jobs support particularly high wages.

Economic Outlook

The national trends in employment are visible in the data presented in Table 6. Over the ten-year period 1996-2006, non-farm employment is projected to increase by 17.5 million jobs in the United States. Virtually all of this increase will be made up of service producing jobs. Manufacturing jobs are forecast to decrease by 350,000 jobs nationwide; 252,000 jobs will be lost in the manufacturing of durable goods and 98,000 jobs lost in the production of non-durable goods. Table 7 presents data on 1996 median weekly earnings as well as employment growth by education and training level. Not surprisingly, job growth will remain in the double digits for those jobs requiring at least some post-secondary education. In addition, these jobs have weekly median earnings more than 50% higher than jobs that do not require post-secondary education.

Table 6
Forecast of National Employment by Major Industry Division, 1995
(thousands of jobs)

	1996-2006
Total	18575
Non-farm wage and salary	17587
Goods producing	20
Mining	-131
Construction	500
Manufacturing	-350
Durable	-252
Non-durable	-98
Service producing	17567
Transportation, communication, utilities	851
Wholesale trade	745
Retail trade	2250
Finance, Insurance, Real Estate	752
Services	11266
Federal government	-87
State & local government	1790
Agriculture	-24
Private household (Domestic Services)	-153
Self-employed	1165

Bureau of Labor Statistics

Table 8 contains the SANDAG's employment forecasts for the San Diego Region from 1995 to the year 2020. Over this period, SANDAG is forecasting a 44% increase in population. Civilian employment is projected to increase by 50% over the same period, translating into an additional 530,000 new jobs. The fastest growing sectors, in terms of percentage of new job created, will be wholesale trade at 111%, FIRE (finance, insurance & real estate) at 73%, and services at 61%. Excluding military employment, the slowest growing sector, both in terms of growth rate and actual numbers of jobs created, is the manufacturing sector (10% growth rate, 12,000 new jobs).

Table 7
Forecast of National Employment by Education and Training

Education and training category	1996-2006 Percent change	1996 median weekly earnings full-time workers
Total, all occupations	14.0	\$483
First professional degree	18.0	1057
Doctoral degree	19.0	847
Master's degree	15.0	682
Work experience plus bachelor's or higher degree	17.8	786
Bachelor's degree	25.4	686
Associate degree	22.2	639
Post-secondary vocational training	7.4	444
Work experience in a related occupation	12.2	534
Long-term on-the-job-training	9.1	490
Moderate-term on-the-job- training	8.7	434
Short-term on-the-job training	13.3	337
Bureau of Labor Statistics		

Table 8
SANDAG Forecasts of Employment, San Diego Region

	1995	2005	2010	2020	Percent Change
Population	2,669,200	3,223,474	3,437,697	3,853,297	44
Total Employment	1,186,837	1,513,234	1,565,824	1,721,651	45
Civilian Employment	1,084,947	1,419,344	1,471,934	1,627,761	50
Manufacturing	114,900	139,231	131,568	126,931	10
Transportation, Communication, Utilities	37,400	48,112	49,011	52,703	41
Wholesale Trade	42,900	67,607	74,704	90,311	111
Retail Trade	186,600	236,399	243,859	265,782	42
Finance, Insurance, Real Estate	55,800	76,497	82,325	96,750	73
Services	310,900	422,459	441,289	499,364	61
Government	186,100	229,852	242,185	264,626	42
Agriculture, Construction, Self- employed	150,347	199,187	206,993	231,294	54
Military	101,890	93,890	93,890	93,890	-8

Table 9 presents the forecasts for changing land use in the San Diego region over the same period. Out of a total of 503,709 acres currently available for development countywide, SANDAG forecasts 146,000 acres will be developed over the next 25 years. The bulk of the development (133,000 acres) will be for low-density single family housing. In terms of industrial property, the county currently has approximately 23,000 acres of developed industrial property, with an additional 10,000 acres slated for future development. Over the next 25 years, 6,600 of these acres are expected to be developed. In terms of percentage growth rates, industrial development, at 29%, lags well behind low-density single family housing (201%), office (62%) and multiple family housing (42%). In recent years, the bulk of the activity in the industrial sector has been in the Highway 78 corridor (with almost 3.5 million square feet of absorption, 1992-1998), Poway (net absorption of 2.5 million square feet over the same period), and Carlsbad (2.2 million square feet). Over the next 20 years these sub-regions will become increasingly built out, and the bulk of new industrial development will come in the South Bay/Otay Mesa sub-regions.

Table 9
SANDAG Forecasts of Land Use, San Diego Region

	1995	2005	2010	2020	Percent Change
Total Acres	2,726,715	2,725,715	2,726,715	2,726,715	
Developed Acres	1,425,179	1,469,736	1,488,765	1,572,307	10
Low Density Single Family	66,267	92,182	110,791	199,482	201
Single Family	116,841	135,607	141,423	150,569	29
Multiple Family	20,128	22,842	24,987	28,674	42
Mobile Homes	4,452	4,345	4,271	3,998	-10
Other Residential	1,287	1,309	1,341	1,330	3
Industrial	22,724	27,998	28,253	29,314	29
Commercial/Services	31,823	35,898	36,567	38,584	21
Office	2,602	3,403	3,561	4,213	62
Schools	10,471	11,299	11,395	11,902	14
Roads & Freeways	103,484	105,486	107,180	108,167	5
Agricultural and Extractive	214,810	199,152	188,792	165,930	-23
Parks and Military Use	830,292	830,214	830,206	830,143	0
Vacant Developable Acres	503,709	459,153	440,123	356,581	-29
Low Density Single Family	450,739	431,996	419,110	348,987	-23
Single Family	27,932	13,960	10,483	2,491	-91
Multiple Family	3,951	2,364	1,396	8	-100
Industrial	10,103	5,076	4,843	3,876	-62
Commercial/Services	5,710	2,872	2,449	569	-90
Office	1,118	649	577	306	-73
Schools	1,278	719	609	333	-74
Roads & Freeways	2,877	1,516	657	12	-100
Constrained Acres	797,827	797,827	797,827	797,827	0

Table 10
SANDAG Forecasts of Employment, City of San Diego

	1995	2005	2010	2020	Percent Change
Population	1,174,422	1,403,874	1,499,437	1,693,533	44
Total Employment	645,159	780,148	801,216	869,977	35
Civilian Employment	606,561	747,084	768,152	836,913	38
Manufacturing	70,161	78,940	74,335	71,828	2
Transportation, Communication, Utilities	23,659	28,370	28,845	30,964	31
Wholesale Trade	21,437	30,752	33,698	40,919	91
Retail Trade					
Finance, Insurance, Real Estate	33,655	45,209	48,037	55,003	63
Services	187,796	237,326	245,831	272,944	45
Government	118,077	138,994	144,385	154,516	31
Agriculture, Construction, Self- employed	62,473	80,084	82,955	91,987	47
Military		33,064	33,164	33,164	-14

Table 11
SANDAG Forecasts of Land Use, City of San Diego

	1995	2005	2010	2020	Percent Change
Total Acres	219,145	219,145	219,145	219,145	0
Developed Acres	173,726	183,174	184,863	190,399	10
Low Density Single Family	253	2,801	3,451	6,757	2569
Single Family	37,356	41,867	42,656	42,281	13
Multiple Family	8,805	9,868	10,950	13,288	51
Mobile Homes	509	494	462	279	-45
Other Residential	359	357	357	343	-5
Industrial	10,450	12,546	12,615	13,046	-5
Commercial/Services	11,219	11,980	12,468	13,138	25
Office	1,599	2,014	2,098	2,426	1,919
Schools	4,839	5,137	5,113	5,285	52
Roads & Freeways	30,762	31,301	31,648	32,198	9
Agricultural and Extractive	15,939	13,251	11,497	9,871	-38
Parks and Military Use	51,636	51,558	51,550	51,488	0
Vacant Developable Acres	19,865	10,417	8,727	3,191	-84
Low Density Single Family	5,966	3,882	3,591	1,234	-79
Single Family	4,153	942	566	64	-98
Multiple Family	2,168	1,483	957	5	-100
Industrial	4,208	2,148	2,100	1,603	-62
Commercial/Services	1,361	823	666	0	-100
Office	594	329	283	141	-76
Schools	409	208	206	134	-67
Roads & Freeways	1,006	602	358	11	-99
Constrained Acres	25,555	25,555	25,555	25,555	0

SANDAG also develops forecasts for cities and sub-regions as well. Tables 10 and 11 contain similar information for the City of San Diego. Over the next 25 years, the population of the City of San Diego is expected to increase by 520,000 people, or a 44% increase, matching the County rate of growth. However, job creation will be coming outside of the City of San Diego. Only 225,000 new jobs will be created in the City, representing an increase of 35%. Not surprisingly, the makeup of these jobs reflects the County composition: 91% growth in wholesale trade jobs, 63% growth in FIRE jobs, and 47% growth in other jobs such as self-employment and construction. Employment in manufacturing jobs will increase by only 2%, translating into an additional 1660 jobs. In terms of land use, by 2020 the City of San Diego will be virtually built out in terms of commercial/services property, multiple family and single family housing. Over the next 25 years, the most development will occur in low-density single family housing with multiple family housing and office space tied for a distant second. Over this period, approximately 2600 acres of industrial property will be developed, representing a growth rate of 25%.

Table 12
SANDAG Forecasts of Employment, Sub-regional Area 5 –Southeast San Diego

	1995	2005	2010	2020	Percent Change
Population	151,507	165,148	172,094	197,772	31
Total Employment	15,010	17,101	17,545	18,788	25
Civilian Employment	15,010	17,101	17,545	18,788	25
Manufacturing	1,055	1,236	1,193	1,172	11
Transportation, Communication, Utilities	929	984	990	1018	10
Wholesale Trade	717	806	840	944	32
Retail Trade	1,733	2,056	2,106	2,240	29
Finance, Insurance, Real Estate	459	528	554	626	36
Services	3,399	3,883	3,988	4,305	27
Government	4,518	5,019	5,220	5,604	24
Agriculture, Construction, Self- employed	2,200	2,589	2,654	2,879	31
Military	0	0	0	0	0

Table 13
SANDAG Forecasts of Land Use, Sub-regional Area 5 –Southeast San Diego

	1995	2005	2010	2020	Percent Change
Total Acres	12,129	12,129	12,129	12,129	0
Developed Acres	11,260	11,432	11,486	11,579	3
Low Density Single Family	4	4	4	4	0
Single Family	5,769	5,821	5,832	5,473	-5
Multiple Family	687	729	787	1,263	84
Mobile Homes	79	74	65	26	-67
Other Residential	10	10	10	10	0
Industrial	180	174	169	148	-18
Commercial/Services	651	691	692	720	11
Office	25	30	28	34	38
Schools	463	467	467	467	1
Roads & Freeways	2,738	2,831	2,831	2,834	4
Agricultural and Extractive	33	33	33	33	0
Parks and Military Use	569	569	569	569	0
Vacant Developable Acres	425	198	144	51	-88
Low Density Single Family	0	0	0	0	0
Single Family	202	98	49	49	-76
Multiple Family	83	77	71	2	-81
Industrial	10	5	4	0	-10
Commercial/Services	42	16	17	0	-100
Office	0	0	0	0	0
Schools	4	0	0	0	-4
Roads & Freeways	83	3	3	0	-100
Constrained Acres	499	499	499	499	0

SANDAG's forecasts for the Southeast San Diego Region are presented in Tables 12 and 13. Population growth over the period 1995-2020 is anticipated to be 46,000 people (a 31% increase, a rate well below the City of San Diego average). Employment growth in this sub-region is expected to be even slower at 25%, implying an increase of slightly more than 3700 jobs. Better than two thirds of the job growth will occur in the just three sectors: government (1086 jobs), services (906 jobs) and retail trade (507 jobs). The manufacturing sector is expected to generate approximately 117 new jobs over this period, just slightly ahead of the sector with the smallest increase, transportation, communications and utilities with 89 new jobs. Not surprisingly, the Southeast San Diego sub-region currently has little developable acreage. In 1995, out of a total of 12,129 acres, the sub-region has only 425 developable acres. The sub-region is projected to be fully built-out by 2020, except for some single family and multiple family property. Currently, there is approximately 190 acres zoned for industrial use in this sub-region, 180 acres of which are developed. SANDAG forecasts that by 2020, there will be no vacant developable industrial land in Southeast San Diego, and in fact 42 acres will be substituted out of industrial use toward other uses.

Land that is zoned for light industrial use can support many different types of employment as well as different employment densities. Types of jobs can range from skilled machining jobs with union affiliation to non-union, warehousing jobs. Densities can vary from one employee per 350 square feet to one employee per 850 square feet.

There are several reasons why high-skill level manufacturing jobs would be preferred to service jobs if both were equally likely to be developed. Appendix 1B provides a breakdown of employment within traditional employment sectors. Appendix 1C illustrates the differences in average hourly earnings across employment sectors. On average, manufacturing jobs pay about 9% more than service jobs, and almost 60% higher than retail trade jobs. There is a great deal of disparity, however, in pay among the different categories of service work. Appendix 1D presents the average hourly earnings across different types of service professions. Not surprisingly, legal services and engineering and management services top the list of the best paid service personnel, and jobs in these fields pay more, on average, than manufacturing jobs. It is anticipated that in the Market Creek Plaza project a portion of the office space will be utilized by people in these service industries.

Higher wages in manufacturing jobs can be attributed, in part, to the higher degree of unionization of these jobs. Not surprisingly, the wage differential commanded by manufacturing jobs can also explain the overall trend in manufacturing employment noted above. The rational response by companies in the United States is to move their manufacturing facilities out of the country to take advantage of relatively lower wages overseas. It is this trend that is driving the slow growth of manufacturing jobs in San Diego and the United States.

However, hourly earnings are not the only measure by which to measure job quality. Appendix 1E presents the percentage of employees covered by health plans by employment sector. 79.8% of jobs in manufacturing are covered by health plans, as opposed to 49% for services and 38.4% for retail trade. Participation in employer sponsored retirement plans also serves as a measure of job quality. Again, manufacturing jobs rank high, with 64.2% of all jobs offering this benefit. This number falls to 35.2% for services, and 25.7% for retail trade as seen in Appendix 1F. Appendix 1G illustrates a similar pattern for percentage of employees covered by short-term and long-term disability plans. Although the percentage of contingent workers (those without an implicit or explicit contract regarding continued employment) is higher for services (7.4%) than manufacturing (3.2%), Appendix 1H shows that this percentage is even lower for those in retail trade (3.0%).

There are a few positives associated with employment in retail trade and services. Appendix 1I presents the percentage of the total work force that is employed part-time for economic reasons (not the employees' choice). For services and retail trade this percentage is around 17%. This means that only 17% of the total work force in services and retail trade are working part-time not out of their own choice. For manufacturing employees, this percentage doubles to 34%. In addition, the nonfatal occupational injury rates are much lower for service and retail trade employees than manufacturing employees. Appendix 1J illustrates these differences, with manufacturing jobs having almost twice the injury rate.

There are additional reasons why the job mix that will be associated with Market Creek Plaza might be preferred to potential development under light industrial use. In addition to the high-end jobs associated with the office space, there will be a wide spectrum of jobs available for community members with lower levels of education or in need of developing a skills set. In addition, Market Creek Plaza will provide entry-level jobs for local residents looking to enter the job market, as well as providing additional jobs for those who may want to work part-time to supplement other employment.

Evaluation of Need for Food/Retail/Office

The need for additional retail space is determined by comparing an estimate of demand for retail goods and services to the supply of such services in the study area. Demand estimates are based on the Consumer Expenditure Surveys conducted by the Bureau of Labor Statistics. Table 14 shows estimates of how consumers allocate their spending among fourteen defined categories. Food expenditures, both for home and for away from home, account for 12% of spending by San Diego residents. This is less than the 14% that residents in all western MSAs spend. In contrast San Diegans allocate 40% of spending on housing (including housing supplies and services) whereas those in the western MSAs spend 31%. Given the relatively lower household income in the study area, the percentage of income spent on housing is estimated to be even higher in the study area. Table 23 also shows the distribution of spending for three income groups. Lower income households spend more on food and housing and less on transportation and insurance than higher income households.

Table 14
Consumer Expenditures, 1997

Category	Regional Surveys		Selected Income Groups from National Surveys		
	San Diego MSA	All Western Region MSA	\$15,000 to \$19,999	\$20,000 to \$29,999	\$30,000 to \$39,999
Food	0.12	0.14	0.16	0.15	0.14
Alcohol	0.01	0.01	0.01	0.01	0.01
Housing	0.40	0.31	0.34	0.32	0.31
Apparel	0.04	0.05	0.05	0.05	0.05
Transportation	0.16	0.18	0.18	0.19	0.21
Health care	0.05	0.05	0.08	0.07	0.05
Entertainment	0.05	0.05	0.04	0.05	0.04
Personal care	0.02	0.02	0.02	0.02	0.02
Reading	0.00	0.00	0.00	0.01	0.00
Education	0.02	0.02	0.01	0.01	0.01
Tobacco	0.00	0.01	0.01	0.01	0.01
Miscellaneous	0.02	0.02	0.03	0.03	0.03
Cash gifts	0.02	0.03	0.03	0.04	0.02
Personal ins	0.10	0.11	0.04	0.07	0.09

Bureau of Labor Statistics, Consumer Expenditure Surveys

Table 15 shows consumer demand for goods and services for each census tract in the study area. For each census tract and spending category, the number of households in each income bracket is multiplied by an estimate of spending per household. The spending per household for each category is calculated by multiplying the fraction of spending a San Diego resident allocates to that category by the total spending for that income bracket. This fraction is adjusted to reflect the fact that lower income households spend more on food and housing. Table 24 shows that \$47 million is spent on food by the residents of these five census tracts.

Table 15

Spending by Census Tract
Adjusting spending to reflect income completely, (millions of dollars)

Category	3001	3101	3102	3300	3402	Total
Food	\$5.95	\$5.09	\$18.18	\$16.10	\$8.80	\$54.13
Alcohol	\$0.46	\$0.39	\$1.39	\$1.11	\$0.62	\$3.99
Housing	\$19.80	\$16.84	\$59.84	\$50.85	\$28.10	\$175.42
Apparel	\$2.20	\$1.86	\$6.55	\$5.37	\$3.01	\$18.99
Transportation	\$7.87	\$6.66	\$24.15	\$19.32	\$10.83	\$68.83
Health care	\$2.16	\$1.87	\$6.70	\$6.55	\$3.52	\$20.80
Entertainment	\$2.71	\$2.27	\$8.04	\$6.09	\$3.47	\$22.58
Personal care	\$0.81	\$0.69	\$2.44	\$2.14	\$1.19	\$7.27
Reading	\$0.25	\$0.21	\$0.74	\$0.61	\$0.34	\$2.14
Education	\$0.78	\$0.66	\$2.28	\$1.97	\$1.06	\$6.74
Tobacco	\$0.20	\$0.18	\$0.64	\$0.69	\$0.36	\$2.06
Miscellaneous	\$0.77	\$0.66	\$2.40	\$2.07	\$1.12	\$7.01
Cash gifts	\$1.16	\$0.97	\$3.42	\$2.57	\$1.52	\$9.64
Personal insur.	\$5.47	\$4.50	\$15.88	\$9.80	\$5.94	\$41.60
Total	\$50.58	\$42.84	\$152.66	\$125.23	\$69.88	

Table 16
Demand and Supply for Retail Services

Category	Estimated total expenditure (millions)	Productivity ¹ (\$/sf/yr)	Estimated retail supported (\$/sf/yr)
Demand			
Food	\$54.13	250	216,520
Alcohol	\$3.99	250	15,960
Apparel	\$18.99	200	94,950
Personal care	\$7.27	200	36,350
Tobacco	\$2.06	250	8,240
Miscellaneous	\$7.01	200	35,050
Total Demand	\$ 93.45		407,070
Inventory (0-2 mile)			150,000
Additional Retail Area Supported			257,070
Planned for Market Creek			
Food 4 Less			60,000
Fast Food			7,300
Restaurant			4,700
Retail Shops			35,000
Total Market Creek			107,000

1 – Based on industry averages presented in KMA/Causby study.

The demand for retail goods and services in the study area is over \$93 million as illustrated by Table 16. This demand is translated into retail space demanded based on the estimates presented by Keyser Marston Associates, Inc. and Causby & Company in their study, “Retail/Entertainment Demand: An Evaluation for the Southeastern Community”. Consumer retail spending needs are currently being met by 407,000 square feet of retail space. The inventory of retail space in the two-mile radius around the Gateway Plaza is 150,000 square feet. This includes the Price-Costco (90,000 sq. ft.), one supermarket (Ralphs, at 901 Euclid, National City) and one general merchandise store (Rite-Aid, at 1735 Euclid). This suggests that currently at least 63% of the retail spending made by the study area residents is being spent outside of the area. The community can support an additional 257,000 square feet of retail space. The Market Creek Plaza proposes 107,000 square feet of retail space. The addition of this retail space will fill a void in services in the community and help keep tax dollars in the City of San Diego.

Market Creek Plaza

Table 17
Market Creek Plaza Project: Costs

Activity	Dollar Value
Land Acquisition	\$3,727,750
Planning	125,000
Leasing Commissions	2,159,338
Architecture	954,370
Financing	2,971,985
Permits	955,000
Grading	1,489,000
Sewer Improvements	217,128
Storm Drain	344,550
Surface Improvements	930,500
Site Improvements	217,128
Landscape & Creek Improvements	5,077,140
Structures-Vertical	30,655,878
Parking Garage	4,625,878
Contingency	1,715,482
Total	\$57,058,671

Market Creek Plaza will contain a 220,000 square foot office complex, a 60,000 square foot Food-4-Less, and an additional 100,000 square feet in a mix of retail, restaurant, and incubator space. Table 17 gives a breakdown of the development costs associated with this project. The construction phase of this job will generate approximately 360 jobs with a wage bill of \$7.9 million. When fully developed, it is expected that Market Creek Plaza will generate employment of almost 1800 people, with an annual wage bill of almost \$50 million. Table 18 provides the breakdown of this employment. In addition, it is anticipated that Market Creek Plaza will generate approximately \$30 million per year in revenues; revenues currently being spent outside of the study area. Table 19 illustrates the sources of these revenues.

The development and operation of Market Creek Plaza will provide many benefits to the community that are less easily quantified. The Jacobs Foundation is committed to

developing community resources throughout the construction and operation of the project. The Jacobs Center is collaborating in the construction of Market Creek Plaza with the Black Contractors Association, Latino Builders, the WORC Foundation, the Minority Contractors Consulting Group, and the San Diego Youth and Adult Coalition. One of the main goals of the collaboration is to assure that at least 65% of the project is built by community-based contractors. In addition, the Jacobs Foundation has developed plans for a program designed to increase the education level and skill set of the local employees. Components of the program include a work readiness program, a labor bootcamp/pre-apprenticeship program, an apprenticeship program, a business skills program for contractors, a mentor/protégé program, and a program on project management and administration. Without question these benefits, though difficult to measure, will be of significant value to the community.

Table 18
Market Creek Plaza Project: Job Generation

	Number of jobs	Hours	Wages	Wage bill
Construction jobs	360	1000	\$22.00	\$7,920,000
Retail				
Food 4 Less	100	2080	\$15.00	\$3,120,000
Fast Food	40	2080	7.00	582,400
Retail Shops	46	2080	8.00	765,440
Multipurpose Center	4	2080	10.00	83,200
Office Complex	1600	2080	15.00	\$49,920,000

Table 19
Market Creek Plaza Project: Sales Revenue

	Square Feet	Revenue per square foot ¹	Revenue
Food 4 Less	60,000	\$250	\$15,000,000
Fast Food	7,300	\$300	\$2,190,000
Restaurant	4,700	\$250	\$1,175,000
Retail Shops	35,000	\$200	\$7,000,000
Office Complex	220,000		
Incubator			
Retail	15,000		
Office	20,000		
Kiosks	1,400		
Total	383,400		\$25,365,000

1 - Based on industry averages presented in KMA/Causby study.

Summary

- At the time of purchase by the Jacobs Foundation, the study property supported employment of 6-8 people with an annual wage bill estimated at \$280,000. Property taxes paid to the City of San Diego amounted to approximately \$8700 annually
- The study property has several constraints that make private industrial development unlikely. The property is located in a flood plain, requiring significant site preparation. In addition, the site requires major access and traffic mitigation.
- The only industrial development that has occurred in the study area over the past ten years has been with the assistance of SEDC. The land in the study area that is currently zoned for light industrial use is severely under-utilized. The bulk of manufacturing jobs in the study area consist of luggage and textile manufacturing.
- National and regional trends in manufacturing employment indicate that few jobs will be created over the next twenty years in manufacturing jobs requiring high skill levels. What little growth that will be occurring in the San Diego region will be occurring outside the City of San Diego.
- The study area is currently under-served in terms of retail space. It is estimated that the residents of the study area support 407,000 square feet of retail space. Current estimates place the inventory of large grocery stores and general merchandise stores within a two-mile radius of Market Creek Plaza at 150,000 square feet. The community could readily support the proposed 107,000 square feet contained in Market Creek Plaza. This additional space would help limit the leakage of some \$60 million in retail spending. A large portion of this leakage, and the corresponding tax dollars, are going to National City and Lemon Grove.
- The construction and operation of Market Creek Plaza will be of significant benefit to the local community. In addition to the infusion of jobs and expenditures (360 jobs, \$50 million in construction expenditures) that will occur during construction, the Jacobs Foundation is partnering with several community and business groups to develop the job skills and business practices of community residents. When fully operational, Market Creek Plaza is expected to support an estimated 1790 jobs with an annual payroll of almost \$50 million. Sales revenue in the proposed development is forecast to exceed \$25 million annually.

Appendix 1A
Business Listings from Major Streets
In the Market Creek Plaza Study Area

Market Street			
Address	Business	Employees	Type of Business
3676	burger king	20-49	retail-eating places
3751	mount hope cemetery	10-19	cemetery
3939	angelica textiles rental	250-499	Home health care services
4001	fleet supply	10-19	wholesale auto parts
4001	lighthouse	5-9	manufacturing-vehicular lighting eq
4001	fleet driveline service	1-2	manufacturing motor vehicle parts
4001	san diego truck brake	3-4	wholesale-autoparts
4001	san diego fleet service	3-4	auto-general repair shop
4041	unifirst corp	20-49	service-laundry and garment services
4060	assemblies of first born	1-2	membership org-religious
4101	mr. d's Liquor	3- 4	retail-liquor stores
4165	appliance ecology	1-2	wholesale electrical appliances
4196	ruben jaramillo	1-2	bakeries
4210	oscar's market	3-4	retail grocery stores
4211	nancy's taco shop	1-2	retail-eating places
4218	bad real deal bar-b-que	1-2	retail-eating places
4234	a&d cleaners	3-4	service-dry cleaning
4261	san diego urban league	20-49	social services
4262	san diego urban league	50-99	schools-vocational
4291	hermie's market	3-4	retail-grocery stores
4296	san diego tire shop	1-2	auto-tire retreading
4301	nancy's flowers	1-2	retail-florists
4629	paul taylor pest control	5-9	bus services-disinfecting
4629	institute for responsible	5-9	social services-individual and family
4637	moody's lunch service	20-49	retail-eating places
4680	neighborhood house assn	5-9	social services-child day care
4680	early headstart program	5-9	membership org-civic and social
4690	new look hair salon	1-2	service-beauty shops
4696	rosy's shoes undergarm	3-4	retail- shoe stores
4696	los reyes mexican food	3-4	retail-eating and drinking places
4704	muang lao market	3-4	retail-grocery stores
4710	asia café	1-2	retail-eating places
4726	muang luang import	1-2	retail- gift novelty
4902	ryder student transportation	50-99	tcu-school buses
4925	blackmans boat service	10-19	manufacturing-boat building repair
4931	e&e industries	20-49	repairs-electrical repair shops
5010	goodalls charter bus serv	20-49	tcu-local bus charter service
5046	major irrigation supply	1-2	wholesale- farm machinery &
5050	jb roofing	10-19	construction-roofing siding
5148	read san diego	5-9	services-individual and family
5148	malcolm x library	3-4	libraries
5275	bryco distributing	10-19	wholesale-industrial
5415	theophilus transportation	5-9	tcu-transportation services
5455	martike products	50-99	manufacturing-luggage
5475	gary manufacturing	10-19	manufacturing-fabricated textile
5515	rainbow vending & distng	20-49	retail-merchandising machine
5525	sewco	20-49	manufacturing-mens and boys cloth
5805	nutter appliance	5-9	repairs-electrical repair shops
5837	taila liquor	3-4	retail-liquor stores
5843	robinson development	5-9	real estate-agents
5855	the bug house	3-4	automotive-general repair

Appendix 1A, cont.
 Business Listings from Major Streets
 In the Market Creek Plaza Study Area

N. Euclid

Address	Business	Employees	Type of Business
1762	h&r block	5-9	service-tax return preparation
1755	fam mart shoes	1-2	retail-shoe stores
1755	fam mart stereo	3-4	retail-radio & electronics
1755	music worl	3-4	retail-record & pre-recorded tape
1755	fam mart snack bar	1-2	retail-eating places
1755	shoe spot	1-2	retail-shoe stores
1755	nails by long	5-9	service-beauty shops
1755	wigs'n things	1-2	retail-misc apparel
1755	fam mart beauty supply	1-2	retail-misc retail
1755	sunset sportswear	1-2	retail – mens and boys clothing
1755	soyoung fashion	3-4	retail-womens fashion
1755	fam mart indoor swap	5-9	real estate-agents &
1753	kragen auto parts	10-19	retail-auto and home supply
1752	brendas house of beauty	3-4	service-beauty shops
1748	sombath senethong md	3-4	health – office of physicians
1736	star nails	1-2	service-beauty shops
1735	rite aid drug stores	10-19	retail-drug stores
1733	red barn sewing & vacuums	1-2	retail household appliance stores
1731	wrigleys supermarket	10-19	retail-grocery stores
1730	isis beauty salon	3-4	service-beauty shops
1729	san diego voice and view	20-49	printing-newspapers
1726	easters travels	5-9	tcu-travel agencies
1723	round table cocktail lounge	10-19	retail-drinking places
1710	pecolias hair design	5-9	service-beauty shops
1669	mount sinai barber shop	3-4	service-barber shops
1666	union bank of california	20-49	banks-commercial banks
1665	ebony beauty supply	1-2	wholesale-service establishment
1655	pic n save	20-49	retail variety stores
1636	jack in the box	20-49	retail-eating places
1515	mcdonalds	20-49	retail-eating places
1350	brighton place san diego	50-99	health-skilled nursing care

Appendix 1A, cont.
 Business Listings from Major Streets
 In the Market Creek Plaza Study Area

Euclid

Address	Business	Employees	Type of Business
126	b&b business forms	3-4	wholesale-stationary and office
126	penny repair	1-2	service-shoe repair & hat cleaning
220	east tech private security	10-19	business service- detec armored car
220	market street nutrition store	3-4	retail-grocery stores
220	crash inc	5-9	social services-individual & family
220	crash south city recovery	5-9	health-specialty outpatient
220	euclid bargain market	3-4	retail-grocery stores
220	fish connection	3-4	retail-eating places
220	subway	5-9	retail-eating places
220	planned parenthood	5-9	health-specialty outpatient
220	check cashing place	1-2	banks-functions related to
248	euclid terrace apartments	3-4	real estate-apart building operator
286	southeast radiology medical	1-2	health-medical laboratories
286	project enable	20-49	social services-individual and family
286	sofi sefa-boakye md	3-4	health-office of physicians
286	semca pharmacy	5-9	retail-drug stores
286	leon kelley md	3-4	health-office of physicians
286	care view medical group	10-19	health-office of physicians
286	care view medical group	10-19	health-office of physicians
286	sandra perez-mccraw md	5-9	health-office of physicians
415	kids copy	1-2	social services-job training
540	churchs fried chicken	10-19	retail-eating places
588	rich & bennys wholesale	3-4	wholesale-flowers
1025	one stop texaco station	3-4	retail-gasoline service stations

Appendix 1A, cont.
 Business Listings from Major Streets
 In the Market Creek Plaza Study Area

South Euclid

Address	Business	Employees	Type of Business
110	legal aid society	50-99	legal services
210	neighborhood house headstart	5-9	social services-child day care
210	southeast presbyterian	5-9	membership org-religious
286	gene moore dds	10-19	health-offices of dentists
304	project new village	5-9	social services
888	warrens bar-b-que	1-2	retail-eating places
894	imperial fish market	3-4	retail-eating places
1060	james dentice dc	3-4	offices of chiropractors
1346	true light apostolic church	3-4	membership org-religious

North Euclid

Address	Business	Employees	Type of Business
2	san diego family clinic	10-19	Health-offices of physicians
4	southern cal second	3-4	retail-miscellaneous
4	el dorado cleaners	5-9	service-power laundries family &
6	wrigleys super market	20-49	retail grocery stores
8	giant new york pizza	1-2	retail-eating places
14	spice copy	1-2	business service-photocopying
24	longs barber and beauty	5-9	service-beauty shops
26	wynn univ school of tae	1-2	recreation-amusement
36	golden donut	3-4	retail-bakeries
36	reece financial services	3-4	credit-loan brokers
36	trisches agape love beauty	1-2	service-beauty shops
36	jackie berien beauty supply	1-2	wholesale-service establishment
36	hair unlimited evergreen	3-4	retail- apparel
47	charles hammond dds	1-2	health-offices of dentists

Appendix 1A, cont.
 Business Listings from Major Streets
 In the Market Creek Plaza Study Area

South Euclid

Address	Business	Employees	Type of Business
502	mohammed ballony md	5-9	health-offices of physicians
502	william reshmd	3-4	health-offices of physicians
502	joseph freitas md	5-9	health-offices of physicians
610	paradise medical	20-49	health-offices of physicians
610	dodson creighton md	1-2	health-offices of physicians
655	douglas gandy	5-9	health-offices of physicians
655	teresita barbadillio md	5-9	health-offices of physicians
655	alber sharf md	3-4	health-offices of physicians
655	iman mikhaail md	3-4	health-offices of physicians
655	coast surgical group	5-9	health-offices of physicians
655	southern cal med clinic	5-9	health-offices of physicians
655	martin taubman dpm	3-4	offices of podiatrists
655	terrence crouch md	1-2	health-offices of physicians
836	hilbertos mexican food	3-4	retail-eating places
901	ralphs grocery	100-249	retail grocery stores
902	friendship manor	50-99	health-skilled nursing care
910	windsor heights	1-2	real estate-building operators
1000	farmers insurance group	20-49	insurance-agents brokers &
2400	so bay community church	3-4	membership org-religious

Appendix 1A, cont.
 Business Listings from Major Streets
 In the Market Creek Plaza Study Area

Imperial

Address	Business	Employees	Type of Business
5102	greene cat liquors	3-4	retail-liquor stores
5102	fachada Mexicans	1-2	retail-eating places
5165	saint ritas catholic school	20-49	schools-elementary and secondary
5496	genesis apartments	5-9	real estate-building operators
5825	st stephens church of god	10-19	membership org-religious
5895	jil productions	1-2	business services-
6125	black contractors associat	3-4	membership org-labor
6145	state employment dv agency	50-99	govt-admin of social and manpower
6145	south metro career center	5-9	social services-job training
6171	Fargos	3-4	retail-eating places
6179	nails by Johnny	1-2	service-beauty shops
6181	samys bakery	1-2	retail-bakeries
6189	isis beauty salon	5-9	Service-beauty shops
6251	99cent bargains	1-2	retail-variety stores
6261	food bargain market	5-9	retail-grocery stores
6281	v&m beauty supply	1-2	retail-miscellaneous
6355	power of life christian cent	1-2	membership org- religious
6375	united janitorial services	20-49	business services-building maint
6435	this is the way church	1-2	membership org- religious
6521	bobbys radiator shop	1-2	automotive-repair
6571	bernard finlay dds	10-19	health-offices of dentists
6607	triple crown youth coalition	10-19	social services-individual &family
6785	encanto headstart center	10-19	social services-child care
6785	boys & girls club	10-19	membership org-civic & social
6839	sanesco oil co	5-9	retail-gasoline service stations
6853	howell liquor & deli	3-4	retail-liquor stores
6945	olmos beauty salon	5-9	service- beauty shops
6945	Almas	5-9	service- beauty shops
6945	tomas beauty salon	1-2	service- beauty shops

Appendix 1A, cont.
 Business Listings from Major Streets
 In the Market Creek Plaza Study Area

Gateway

Address	Business	Employees	Type of Business
675	mountain high hosiery	250-499	manufacturing-mens and boys neck
720	gateway dialysis	20-49	health-kidney dialysis centers
720	sharp skins	5-9	manufacturing-automotive and apparel
770	Westerfield	50-99	manufacturing-commercial lighting fixtures
Center			
610	western upholstery supplies	3-4	wholesale service establishment
610	baja printing	10-19	commercial printing
610	Hrp	3-4	wholesale-plastics
610	delta custom box	10-19	manufacturing-boxes
610	united domestic workers	5-9	membership org-labor
650	Costco	100-249	Wholesale-general merchandise
789	loftin business forms	50-99	printing-commercial printing
823	johanson dialectrics	50-99	manufacturing-electronic components
885	quality cabinet and furniture	100-249	manufacturing-wood partitions
930	project employment	5-9	schools
955	commercial press	100-249	printing-commercial printing
960	commercial instant press	20-49	printing-commercial printing
995	gateway pediatric	5-9	health-offices of physicians
995	gateway medco	10-19	retail-drug stores
995	southeast radiology	1-2	health-offices of physicians
995	sharp gateway medical	10-19	health-offices of physicians
995	athena women health	5-9	health-offices of physicians
995	SEDC	10-19	membership org-business
995	robinson	10-19	health-offices of dentists
995	san diego county adoption	10-19	govt-admin of social and manpower

Appendix 1A, cont.
 Business Listings from Major Streets
 In the Market Creek Plaza Study Area

Federal

Address	Business	Employees	Type of Business
4006	san diego police revolver cl	3-4	recreation-amusement
4444	sign tech	50-99	manufacturing-signs and advertising
4445	montgomery excavating	10-19	construction-excavating
4455	a-american self-storage	5-9	real estate-nonresidential building
4455	a-american business center	3-4	real estate-nonresidential building
4506	bear communications	10-19	business services-equipment rental
4506	four ls printing	10-19	printing-commercial printing
4506	williams specialty services	10-19	retail-gasoline service stations
4510	san diego scale company	5-9	wholesale-commercial equipment
4514	holaday & shields	3-4	manufacturing-games toys
4514	carden convention service	5-9	business services-equipment rental
4520	brinks	50-99	business services-armored car
4550	thorpe insulation	5-9	construction-plastering
4559	atas intl	5-9	manufacturing-sheet metal work
4567	d&h truck equipment	20-49	automotive-repair
4576	anthonys rentals	1-2	retail-household appliance store
4580	san diego pet supplies	5-9	wholesale -nondurable goods
4704	tortilla flats	3-4	retail-liquor stores
4715	ortwin hardware	10-19	retail-hardware stores
4727	rainbow supermarket	20-49	retail-grocery stores
4756	holeman realty	1-2	Real estate-agents
4760	sedlack rental company	10-19	real estate-nonresidential buildings
5050	anderson-ragsdale mortuary	10-19	service-funeral service
5055	par liquor stores	5-9	retail-liquor stores
5059	el gran taco	3-4	retail-eating places
5061	venus wigs	3-4	retail-misc apparel
5065	your valet cleaners	1-2	service-garment pressing
5070	taco bell	10-19	retail-eating places
5071	check cashiers	1-2	banks-functions related to
5073	chief auto parts	10-19	retail-auto and home supply
5075	hometown buffet	20-49	retail-eating places
5075	big bear corporate office	10-19	real estate-agents &
5090	tuneup masters	1-2	automotive repair

Appendix 1B

Percent Distribution of Private Nonagricultural Wage and Salary Workers
by Industry and Occupation
1996

	Executive, admin. and managerial	Professional specialty	Technical and related support	Sales	Administrative support, including clerical	Service	Precision production, craft, and repair	Operators, fabricators, and laborers
Total	12.8	11.4	3.5	13.5	14.7	13.8	11.8	17.9
Services	14.0	24.9	6.7	3.3	16.8	23.9	4.6	5.2
Mining	13.3	7.2	3.5	1.9	8.5	1.3	37.8	26.7
Construction	9.8	1.8	0.5	1.0	6.1	0.4	56.9	23.4
Manufacturing	12.2	9.3	3.2	3.7	10.1	1.3	18.9	40.9
Durable goods	12.4	10.0	3.5	2.8	9.5	1.2	22.3	37.9
Non- durable goods	12.1	8.1	2.6	5.2	11.1	1.5	14.0	45.3
Transportation and public utilities	13.2	7.0	4.4	3.7	21.4	2.9	14.7	32.6
Wholesale trade	11.2	2.2	1.2	35.5	16.5	1.1	7.0	23.8
Retail trade	7.4	1.8	0.6	39.4	7.7	25.3	5.5	12.0
Finance, Insurance, Real Estate	4.9	2.4	0.9	53.2	10.6	3.6	7.7	16.3

Monthly Labor Review, Feb., 1998

Appendix 1C

Average Hourly Earnings
1996

Employment Category	Average Hourly Earnings
Total private non-farm	\$11.81
Services	11.79
Mining	15.61
Construction	15.46
Manufacturing	12.78
Durable goods	13.34
Non-durable goods	11.97
Transportation and public utilities	14.44
Wholesale Trade	12.87
Retail Trade	7.99
Finance, insurance, real estate	12.79

Monthly Labor Review, Feb., 1998

Appendix 1D

Average Hourly Earnings of Non-supervisory Workers
in Private Service Industries
1996

Sector	Average Hourly Earnings
Services	\$11.79
Agricultural services	9.20
Hotels and other lodging places	8.15
Business Services	11.21
Auto repair, services, and parking	10.20
Miscellaneous repair services	12.12
Motion pictures	13.88
Amusement and recreation services	8.82
Health services	12.85
Legal services	16.60
Social services	8.55
Engineering and management services	16.36

Monthly Labor Review, Feb., 1998

Appendix 1E

Covered by Health Plan
April 1993

Sector	Percent of employed
Private wage and salary workers	57.8
Services	49.0
Agriculture	26.8
Mining	83.1
Construction	43.1
Manufacturing	79.8
Durable goods	84.5
Non-durable goods	73.6
Transportation and public utilities	77.0
Wholesale trade	72.2
Retail trade	38.4
Finance, Insurance, Real Estate	67.8

Monthly Labor Review, Feb., 1998

Appendix 1F

Participation in Employer Sponsored Retirement Plan
April 1993

Sector	Percent
Private wage and salary workers	43.8
Services	35.2
Agriculture	8.8
Mining	69.1
Construction	32.1
Manufacturing	64.2
Durable goods	68.2
Non-durable goods	59.0
Transportation and public utilities	61.8
Wholesale trade	50.5
Retail trade	25.7
Finance, Insurance, Real Estate	57.6

Monthly Labor Review, Feb., 1998

Appendix 1G

Coverage Under Short- and Long-term Disability Plans
April 1993

Sector	Short-term	Long-term
Private wage and salary workers	54.0	37.7
Services	55.1	31.4
Agriculture	24.3	12.6
Mining	64.4	61.3
Construction	22.5	28.4
Manufacturing	63.6	52.0
Durable goods	66.7	55.4
Non-durable goods	59.6	47.5
Transportation and public utilities	72.0	53.8
Wholesale trade	64.2	45.2
Retail trade	35.3	22.3
Finance, Insurance, Real Estate	73.0	51.3

Monthly Labor Review, Feb., 1998

Appendix 1H

Contingent Workers Feb 1995

Sector	Percent of employed
Total	4.9
Services	7.4
Agriculture	9.6
Mining	2.5
Construction	11.1
Manufacturing	3.2
Durable goods	3.3
Non-durable goods	2.9
Transportation and public utilities	3.0
Wholesale trade	2.4
Retail trade	3.0
Finance, Insurance, Real Estate	1.9

Monthly Labor Review, Feb., 1998

Contingent workers are defined as those who do not have an explicit or implicit contract to continue their employment into the future.

Appendix 1I

Part Time for Economic Reasons, 1996

Sector	Percent of total workforce
Total	19.3
Services	16.8
Agriculture	30.4
Construction	50.9
Manufacturing	34.0
Durable goods	32.0
Non-durable goods	35.4
Transportation and public utilities	26.8
Wholesale trade	21.7
Retail trade	17.7
Finance, Insurance, Real Estate	13.4

Monthly Labor Review, Feb., 1998

Excludes persons who usually work full time but worked fewer than 35 hours during the survey reference week for non-economic reasons, such as vacations, holidays, illnesses, child care problems, other family or personal obligations, civic or military duty, bad weather that affected the job, or labor disputes.

Appendix 1J

Nonfatal Occupational Injury
1995

Sector	Per 100 full-time equivalent workers
Total private	8.1
Services	6.4
Agriculture	9.7
Mining	6.2
Construction	10.6
Manufacturing	11.6
Durable goods	12.8
Non-durable goods	9.9
Transportation and public utilities	9.1
Wholesale trade	7.5
Retail trade	7.5
Finance, Insurance, Real Estate	2.6
Monthly Labor Review, Feb., 1998	