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STAFF REPORT

SUBJECT: Draft Regional Growth Forecast Comments Summary and Responses

MEETING DATE: April 5, 2007

AGENDA ITEM: 4

STAFF CONTACT: Brian Bresolin

RECOMMENDATION:

- A. Receive presentation on Revised Draft RGF 2007 and discuss response to comments.
- B. Support forwarding draft RGF 2007 to the SBCAG board and recommend public workshops on the draft forecast.

DISCUSSION:

Formal written comments on the January draft were received from the majority of cities and the County with the exception of the Cities of Guadalupe, Santa Barbara, and Solvang. The draft was also distributed to other governmental agencies and interested parties. These included LAFCO, UCSB Economic Forecast Project, UCSB Planning, Santa Ynez Band of Chumash Indians, SLOCOG, Department of Finance, Employment Development Department, county organizations including the Santa Barbara County Education Office, Social Services, and several local land use consultants. Comments from these organizations and individuals were more limited.

Comments varied from minor editorial corrections to significant methodological issues. Some agencies also provided land use updates. As a result, the forecast model was re-run and revised population and employment forecasts were generated. The resulting population forecast, reflecting a change in land use inputs, show a decrease in the 2005-2040 period growth for the City of Goleta, from 30 percent to 20 percent, and an increase in population for the City of Santa Maria from 31 percent to 35 percent. The unincorporated area South Coast population growth decreases by 1,000 vs. 2,000 due to a household size revision. The remaining jurisdictions population forecasts remain the same. Jurisdictions with changes in the population forecast are shaded in grey **Table 1** below.

**Table 1
Revised Population Forecast**

Jurisdiction	2005	2010	2015	2020	2025	2030	2035	2040
South Coast	204,700	205,800	208,500	211,300	213,600	215,700	216,300	216,900
City of Carpinteria	14,300	14,200	14,400	14,600	14,800	15,000	15,100	15,300
City of Santa Barbara	89,800	90,000	91,000	92,000	92,400	92,800	92,800	93,000
City of Goleta	31,000	31,700	33,100	34,500	35,900	37,300	37,300	37,300
Cap. -Uninc.	5,100	5,200	5,200	5,300	5,300	5,400	5,400	5,500
SB -Uninc.	64,400	64,600	64,800	65,000	65,200	65,400	65,500	65,800
Lompoc Valley	59,400	61,200	62,600	64,200	65,800	67,400	69,000	70,400
City of Lompoc	41,800	43,300	44,400	45,700	46,900	48,200	49,500	50,700
Lompoc -Uninc.	17,700	18,000	18,300	18,600	18,900	19,100	19,400	19,800
Santa Maria Valley	129,100	137,600	146,900	156,400	165,700	169,200	171,800	174,600
City of Santa Maria	88,500	95,000	102,300	109,500	116,700	118,300	118,900	119,400
City of Guadalupe	6,300	7,100	8,000	8,800	9,600	10,400	11,200	12,000
SM -Uninc.	33,800	35,000	36,200	37,500	38,700	39,900	41,100	42,500
Guad. -Uninc.	400	500	500	500	600	600	700	700
Santa Ynez Valley	23,000	24,000	25,100	25,900	26,400	27,000	27,600	28,200
City of Solvang	5,400	5,600	5,800	5,900	6,000	6,200	6,400	6,600
SY -Uninc.	13,100	13,500	14,000	14,300	14,300	14,300	14,300	14,300
City of Buellton	4,500	4,900	5,300	5,700	6,100	6,500	6,900	7,200
Cuyama Valley	1,300	1,500	1,700	1,800	1,900	2,100	2,300	2,700
County Total	417,500	430,200	444,900	459,600	473,400	481,400	487,000	492,800
Total Unincorporated	135,900	138,300	140,700	143,000	144,900	146,800	148,900	151,200
Total City	281,600	291,900	304,200	316,600	328,500	334,600	338,100	341,500

The revised employment forecast reflects a change in methodology using an average of 1995-2005 development to allocate employment instead of the previous method that used nonresidential buildout capacity. In general, employment was lowered for all the unincorporated areas and the three incorporated cities of Carpinteria, Goleta, Guadalupe. The total unincorporated employment decreased 5,290 from 10,490 to 5,200 while the total incorporated area employment increased by the same amount. The following **Table 2** shows the revised 2005-2040 employment forecast. **Table 3** compares the January Draft with the revised draft population and employment forecasts for year 2040. Areas shaded in grey have changed from the previous January draft.

Table 2
Revised Employment Forecast

Jurisdiction	2005	2010	2015	2020	2025	2030	2035	2040
South Coast Area	109,809	114,553	118,690	121,956	124,763	125,529	125,876	126,131
City of Carpinteria	7,016	7,316	7,527	7,694	7,838	7,877	7,894	7,907
City of Santa Barbara	63,386	66,570	68,955	70,839	72,457	72,899	73,099	73,246
City of Goleta	23,447	24,586	26,033	27,175	28,157	28,425	28,546	28,635
Unincorporated	15,960	16,081	16,174	16,248	16,311	16,328	16,336	16,342
Lompoc Area	20,854	22,237	23,138	24,060	24,806	25,333	25,861	26,388
City of Lompoc	13,842	15,226	16,084	16,962	17,673	18,176	18,678	19,181
Unincorporated	7,011	7,011	7,054	7,097	7,133	7,158	7,183	7,208
Santa Maria Area	47,545	52,655	56,071	58,457	63,357	69,578	76,218	82,950
City of Santa Maria	40,310	44,031	47,181	49,380	53,898	59,633	65,755	71,961
City of Guadalupe	1,831	1,831	1,836	1,839	1,846	1,854	1,863	1,873
Unincorporated/Cuyamaca	5,404	6,793	7,055	7,238	7,613	8,090	8,599	9,116
Santa Ynez Area	9,843	10,555	11,102	11,528	12,075	12,560	13,046	13,531
City of Solvang	3,773	3,802	3,848	3,883	3,929	3,969	4,010	4,050
City of Buellton	2,715	3,088	3,478	3,782	4,172	4,519	4,865	5,212
Unincorporated	3,355	3,665	3,776	3,863	3,974	4,072	4,171	4,269
County Total	188,050	200,000	209,000	216,000	225,000	233,000	241,000	249,000

Table 3
2040 Employment and Population Comparison

Jurisdiction	2040 Population January Draft	2040 Population Revised Draft	2040 Employment January Draft	2040 Employment Revised Draft
Carpinteria	15,300	15,300	8,000	7,900
Santa Barbara	92,800	93,000	69,800	73,200
Goleta	40,500	37,300	30,100	28,600
Carp. Uninc.	5,500	5,500		
SB Uninc.	66,600	65,800	18,100	16,300
Lompoc	50,700	50,700	18,500	19,200
Lompoc Uninc	19,800	19,800	7,900	7,200
Santa Maria	116,300	119,400	69,000	72,000
Guadalupe	12,000	12,000	2,400	1,900
Santa Maria Uninc	42,500	42,500	11,500	9,100
Guadalupe Uninc	700	700		
Solvang	6,600	6,600	3,900	4,000
Buellton	7,200	7,200	4,900	5,200
SY Uninc	14,300	14,300	4,700	4,270
Countywide	493,600	492,800	249,000	249,000

Some of the other more significant comments and staff responses include the following:

- According to county staff, some policy issues related to the amount of commercial space allocation in the Santa Valley and other unincorporated areas commercial remain unresolved as some community plans are undergoing review.

Response: The Forecast requires the most up to date general and community plan information available at this time. Since community plan updates are an ongoing process some plans may not be adopted in the course of this effort, however their preliminary findings should be included.

- Land use input outliers (large projects that do not represent typical development) should be removed from inputs to the model as they could skew forecast trends.

Response: Since the forecast inputs are an average of the previous 15 years outliers are not as significant as trends based on annual data. Larger projects that are used in the forecast to model land use trends are often built in phases over a longer period of time and so do not skew the data. If all the large projects were removed from inputs then the data would underestimate the potential for overall growth.

- The employment model does not seem to be linked to the housing forecast model.

Response: The employment model is tied to the household forecast (constraints) model using a workers per household factor. In other words, the household forecast is used to determine the number of resident workers. These resident workers are used to determine the reasonableness of the employment forecast in terms of available labor force. The employment model to a certain extent drives population growth as in-migrants arrive for the new jobs. If, for example, the employment forecast was negative then we would experience a reduction in resident workers, household demand and possible net out-migration.

- The employment forecast should utilize a permit CAP as does the household forecast.

Response: The 2000 to 2005 rate of employment growth is based on historic construction while the 2005-2010 is based on proposed, permitted and under construction. In the previous draft the forecast beyond 2010 was based on the land use “buildout” capacity. The recommendation of a permit cap resulted in a modification of the employment model that uses an average of the 2000-2005 and 2005-2010 actual and proposed construction in the allocation of employment to the city level. Since employment growth is declining countywide and for each jurisdiction this average is not exceeded in future forecast periods it is capped as suggested.

- Density bonus policies are not factored into the buildout capacity analysis.

Response: Density bonus definition added as follows: An increase in the allowable number of residences granted by the city or county in return for the project's providing low- or moderate-income housing (see Government Code section 65915). Requested information

from City of Santa Barbara as an example to determine the total number of units built in a given year and then how many of those were Density Bonus.

Other changes to the draft forecast include adding a section on jobs housing balance and jobs housing ratio reference noted in the f section beginning on Page 20 of this staff report. Also of note is the forecast workforce compared to forecast jobs in the Santa Maria Region. Census figures from the year 2000 show approximately 4,000 commuters travel daily from San Luis Obispo to work in the Santa Maria Valley. By the year 2040 an additional 14,000 commuters from the San Luis Obispo County region is anticipated. Based on analysis from the Tri-County Growth Comparison (see Appendix 8) ,7,000 additional housing units are under construction, permitted or proposed for the southern San Luis Obispo County area. This new residential construction has the potential to provide the approximately 9,000 additional workers. Additional future residential growth in the southern San Luis Obispo area is anticipated to provide the workforce for job growth in the Santa Maria Valley.

Recent information from UCSB on their Draft 2007 Long Rang Development Plan shows the potential for additional growth in the unincorporated Goleta Valley-Isla Vista-UCSB area. According to the not yet released draft plan, approximately 5,000 additional students and the same number of “student beds” are anticipated. In addition, approximately 1,700 additional faculty and staff and 1,600 units are anticipated. The plan also anticipates 2 million additional square feet not including housing or parking. This growth potential has not been factored into the forecast update as yet since it not been formally approved. Also of note is the Isla Vista Master Plan that proposes up to 1,400 new units in the Isla Vista community. This plan has not been formally adopted although it has had recent Planning Commission review.

Attachments

1. Jurisdiction Comments and SBCAG Responses.
2. Revised Text

**Attachment 1
Jurisdiction Comments and SBCAG Responses**

City of Carpinteria

1. Page 25

The City of Carpinteria has several new projects. The Lagunitas mixed use project was recently approved and includes 145,000 square feet of Office and R and D space (though the square footage may be reduced to 85,000 square feet). Pending projects include the Rincon Bluffs resort that is zoned for a hotel/resort. It is under ~~conceptual~~ review for a project that includes:

- 92 room Hotel;
- 96 unit Condo Hotel;
- 26 Bungalows;
- Wellness Center (11,868 square feet);
- Meeting Rooms (16,643 square feet);
- Restaurants (21,750 square feet);
- Culinary School (5,763 square feet); and
- Pavillion (4,461 square feet).

~~and could raise public concerns.~~ An application is also pending for the development of the Venoco Oil and Gas Processing Facility to install an onshore drill rig to access offshore oil and gas resources.

Development in the City of Carpinteria that is located within an appeals jurisdiction is subject to review by the California Coastal Commission. All three of the above mentioned projects are appealable to the Commission.

Response

Updated text accordingly.

2. Page 29

Carpinteria City

In Construction:

Carpinteria Gateway, 4991 Carpinteria Avenue, Retail 6,000

Narang 4646 Carpinteria Avenue, Retail 4,672

Pending:

Rincon Bluffs Resort, Hotel 225 215 Rooms

Lagunitas 6385 Via Real, R&D 85,000

Response

Updated table accordingly

3. Page 34

Table 11

City of Carpinteria 350,000 100% 4,137 *(This may need to be changed to 300,000 to reflect the expected change at Lagunitas)*

4. Appendix 5, Page 5

City of Carpinteria 350,000(or reduce to 300,000) City of Carp
correspondence with Jackie Campbell, February 6, 2007

Response

Updated table accordingly

City of Buellton

1. Comments on Summary section.

Page 6, third Bullet: Buellton's goal is to cater to tourists and provide retail services for local residents.

Response

Noted and updated

2. Page 9, Bottom paragraph. Buellton's general Plan Buildout will not provide for additional capacity.

Response

Noted and edited.

3. Page 20, sixth bullet. Buellton is also in the process of a downtown redevelopment process.

Response

Noted and updated in text of page 6

4. TPAC Roster, Angela Perez title is Assistant Planner.

Response

Noted and Updated

5. Page 14, We are not aware of any group quarters.

Response

Group quarters are tabulated in both the 2000 Census and the DOF estimates.

6. Appendix 4, Page 24, An 80 acre winery was not recently completed on Thomas Road.

Response

Noted and edited.

7. Appendix 4 page 29, Table 10, The list of projects is outdated. Enclosed is a current list of the projects in the city.

Response

Noted and table updates with new project list.

8. Appendix 5, page 4, Change the number of additional units to 1,814.

Response

Noted and edited.

9. Appendix 5, page 5, Change the additional square footage to 1,197,730.

Response

Noted and edited

10. Appendix 5, page 10 Table 6, Says that there is a potential 877 units with an average density of 1 unit per acre. Should be changes to 877 units with an average density on one unit per lot and noted that they are secondary dwelling units. The number of units on 8-10 units per acre should be changed to 43. The number of potential units with 14-16 units per acre should be changed to 88.

Response

Noted and edited

11. Should anything be included in the RGF regarding Buellton’s sphere of influence.

Response

Noted and edited on Table 3 page 7

City of Santa Maria

1. The Draft Growth Mitigation Fee information was used to update the current City buildout. With three exceptions, it is the most up to date information on land use. Because the Mahoney Ranch, Enos Ranchos, and Downtown Plan areas extend beyond the 3-year update timeframe for AB 1600 Fees, these development areas were excluded from the buildout totals:

1. Mahoney Ranch had **1,722** potential units; it will be reduced to **1,171** (the plan amendments keep a school and 5-7 acres of neighborhood commercial at 10,000 sf/acre = 50-70 Ksf).
2. Enos Ranchos would go from **840** du to **240**; the commercial space would go from **250 Ksf** up to **850 Ksf**. A junior high school would remain in the plan or be an additional 17 acres for single-family housing--about 85 du.
3. The Downtown Specific Plan would add potential for **1,800** du and over **2.1 Msf** of office and retail space.

TABLE below does NOT include the three exceptions described above:

Assessment of Additional Commercial, Industrial and Residential Capacity

	Acres		Square Feet
COMMERCIAL	120		1,253,041

INDUSTRIAL	1,019		10,653,109
RESIDENTIAL	Units	Ave. Square Feet	Total Square Feet
SINGLE FAMILY	3,367	2,000	6,734,391
MULTI FAMILY	2,573	1,000	2,572,500
MIXED USE	608	750	455,700
SENIOR-AFFORDABLE	736	600	441,780

It is best to use the current buildout numbers for the existing land uses; anything else would be questioned as speculation. This excludes the Enos Ranchos (annexation) and downtown (draft specific plan) buildout numbers. It keeps Mahoney Ranch at 1,722 dwelling units and 70,000 sf of commercial. It also keeps the 1998 Airport Specific plan land uses unchanged in the buildout.

This sets the current **January 2007 buildout** at:

- 127 acres of commercial/retail/office = 1,323,041 sf
- 1,019 acres of industrial/airport service = 10,653,109 sf
- 9,006 dwelling units

Response

The totals from the new table and Santa Maria City comments advise the use of 9,000 units and 12 million square feet of commercial, retail or industrial as a buildout assessment. Tables 1 and 2 Appendix 5 will be updated as well as the constraints model and all its output.

County of Santa Barbara

1. Averages are generally used in all models as major constraints; therefore, some outliers have significant potential to impact the overall growth forecast. The County requests that all large order outliers be removed from forecasts (Specific example related to Employment #1 below).

Response

The forecast methodology uses 15 year historical averages of residential development that provide a cap on development. The employment forecast uses a ten year average of non residential development. These long term averages smooth out the effect of outliers. In addition, many larger projects are phased in over time and could be considered in essence a series of smaller projects.

The constraints are to be considered only as an upper limit of potential capacity for the 35 year forecast period. If we remove all outliers for all jurisdictions we would not reflect actual growth potential but something much less.

2. The County requests that the Jobs/Housing/Workers charts show median salaries and median housing prices.

Response

Noted and included in the text on page 51.

POPULATION

1. The draft noted that the City of Goleta is forecasted to grow by 30%, whereas unincorporated Goleta will only grow by 3%. Please discuss the assumptions and rationale that led to this conclusion in the RGF, and provide an opportunity for comment based on that discussion.

Response

The revised City of Goleta population growth is forecast to grow by 20 percent due to changes in potential housing opportunities. In Appendix 5 of the current draft document the housing construction ceiling for Goleta City was 690 units over a five year period and has been revised to 520 compared to the unincorporated Goleta with only 65 units. Since the unincorporated area is so limited in the pace of residential development the overall population growth is significantly lower than the City of Goleta. The source of the construction rate data is the UCSB Economic Forecast Project.

Recent information from the UCSB Planning staff points out several larger residential projects that could increase the overall growth in the unincorporated (UCSB) area.

2. The household size is projected to decrease in most incorporated areas, but increase in most unincorporated areas. Please discuss the assumptions and rationale that led to this conclusion.

Response

The following text is taken from Page 27 and 28 Appendix 7 of the draft document.

The remaining unincorporated South Coast areas of Toro Canyon and Montecito are already characterized by low proportions of Hispanic households and limited overcrowding so the household size trend is forecast to be constant. The unincorporated South Coast areas of Toro Canyon Montecito and Goleta Valley are already characterized by low proportions of Hispanic households and limited overcrowding so the household size trend is forecast to be constant.

Historically, there has been a decline in household size for the unincorporated Lompoc valley. The unincorporated Lompoc valley has been subject to wide variations in population over the years due to program changes at Vandenberg AFB. There are no anticipated program changes at this time so the episodic influence of ongoing missions at VAFB is assumed to be minor. The unincorporated area, including Mission Hills and Vandenberg Village, has a high proportion of single family units, families, and Hispanic households that would indicate an increasing household size forecast. Both increasing and decreasing household size influences combined suggest a stable household size forecast.

The unincorporated area of Orcutt has experienced a stable household size. This is anticipated to continue due to the low proportion of the Hispanic population and limited overcrowding.

The unincorporated portion of the Santa Ynez valley had experienced a declining household size and has some of the lowest proportions of overcrowding. These conditions will moderate future increases in household size associated with development of mostly single family detached housing.

3. The City of Carpinteria received a “higher score” than unincorporated South Coast for increase in household size, yet their forecasted household size decreases, while the County’s increases (Appendix 7, pg. 26 and 29). Please discuss the assumptions and rationale that led to this conclusion in the RGF.

Response

The City of Carpinteria school districts are also **experiencing a reduction in elementary school enrollment and a current DOF estimate of household size that is lower than the Census 2000.**

However, Carpinteria also has a high proportion of Hispanic and family households characteristic of higher household sizes. Thus, the City of Carpinteria forecast is for a slight decline in household size.

The remaining unincorporated South Coast areas of Toro Canyon and Montecito are already characterized by low proportions of Hispanic households and limited overcrowding so the household size trend is forecast to be constant.

EMPLOYMENT

1. One project on Appendix 4, pg. 28, accounts for the vast majority of the County’s allocated nonresidential square footage over the next five years. If this project is not built or is significantly revised, employment forecasts for the County will be dramatically impacted. The County requests that this and other significant outliers be noted in the RGF and removed from the forecast model to more accurately reflect project permit trends.

Response

If the project is going forward it should be included to more accurately reflect short term growth. As mentioned in comment 1, the forecast methodology uses 15 year historical averages of residential development that provide a cap on development. The employment forecast uses a ten year average of non residential development. These long term averages smooth out the effect of outliers. In addition, many larger projects are phased in over time and are in essence a series of smaller projects. The constraints are to be considered only as an upper limit of potential capacity for the 35 year forecast period. If we remove all outliers we would not reflect actual growth potential.

2. The employment forecast model does not appear to be tied to the housing forecast model, even though certain types of employment drive a need for certain types and quantities of housing units. Please discuss this potential disconnect and how the assumptions are reconciled through other means in the RGF.

Response

The employment model is tied to the household forecast (constraints) model using a workers per household factor. In other words, the household forecast is used to determine the number of resident workers. These resident workers are used to determine the reasonableness of the employment forecast in terms of available labor force. The employment model to a certain extent drives population growth (we also must consider births) as new in-migrants arrive for the new jobs. If, for example, the employment forecast was negative then we would experience a reduction in resident workers, household demand and possible net out-migration.

DEVELOPMENT POTENTIAL

1. Please note that policy-makers may decide that the unincorporated County is over allocated regarding commercial space. Since local general plans provide the dominant constraint for the employment forecast, this section of the forecast will need to be revised if such policy actions are taken.

Response

The forecast should represent current policy. If there is a change or perceived change in policy to reduce commercial, retail, industrial space then it should be incorporated into the forecast either as hard numbers or possibly a quantitative overview of what may be anticipated in the near future. In this way we can be consistent with the current adopted General Plan policy while attempting to account for any near term changes. If there is some appropriate text reflecting this over allocation of commercial space this should be included in the report. The other option is to modify any land use changes in the next forecast update.

2. The County recommends that the nonresidential development model include a historical permit activity “cap,” similar to the constraint that is applied to residential development. This would assist in capturing constraints on employment growth such as traffic impacts, workforce availability, etc.

Response

The 2000 to 2005 rate of growth is based on actual construction while the 2005-2010 is based on proposed, permitted and under construction. The forecast beyond 2010 was based on the land use capacity. Your recommendation of a permit cap resulted in a modification of the employment model that uses an average of the 2000-2010 actual and proposed construction in the allocation of employment to the city level. Since employment growth is declining countywide and for each jurisdiction the average is not exceeded in future forecast periods.

3. Historical permit activity may not be an accurate gauge for the forecasted rate of residential development in the Santa Ynez Valley, because the new Draft Santa Ynez Community Plan will somewhat alter development patterns in the area. This is also true for the Los Alamos area, which is presently engaged with the process of updating their Community Plan.

Response

The new draft SY Community Plan data should be incorporated if available. In addition the Los Alamos revisions should also be incorporated as available. If there is available text in the draft SY Valley or Los Alamos plan that describes this alteration of development plans that should be incorporated into the forecast report.

4. The last sentence of the note at the top of the Residential Density Table (pg. 10, Appendix 5) should read: The residential zoning in the unincorporated area reflects the fact that most of the rural and agricultural land in Santa Barbara County is in the unincorporated area, versus the cities which, due to their urban nature, have a more proportionate mix of low and high density housing. Additionally, a note should be added to the Residential Density Table explaining why the data does not reconcile with the Build-out Table (pg. 4, Appendix 5). These issues underscore the point that density assumptions are vital to understanding the limits of growth, especially as incorporated cities approach build out. An assumption of less dense development in the incorporated areas may lead to premature annexations of the unincorporated County’s developable land by cities. It is also worth noting that State Housing Law demonstrates a preference for growth being directed towards urban areas.

Response

Text change will be incorporated as recommended.

City of Goleta

1. The Goleta General Plan provides maximum buildout estimates allowed under the Land Use Plan to approximately 2030, a time period consistent with the SBCAG’s Forecast Report. The maximum housing unit forecast totals are presented in the Land Use and Housing Elements. The Land Use

Element proposes a housing unit increase of 3,880 units and includes all potential buildout, including an aggressive assumption of mixed-use and redevelopment sites. The Housing Element proposes an increase of **2,619** units, 1,261 units less than the Land Use Element. This decrease reflects a reduced number of mixed-use and redevelopment sites. Both elements include redevelopment at the Fairview and Calle Real Shopping Centers, for example. But the Housing Element reflects fewer net units at these sites, a more realistic scenario. The Administrative Draft Forecast Report reflects the Land Use Element buildout estimate. The City **requests that SBCAG modify the Forecast Report and related modeling to reflect the Housing Element buildout** estimates, a more realistic scenario. A table on page 9 of the Administrative Draft Forecast Report Summary presents the total forecasted buildout for each jurisdiction in Santa Barbara County. The City notes that Goleta proposes far more additional units than any other jurisdiction in the South Coast, including the combined unincorporated areas. For the purposes of data comparability, **it would be helpful to present a table documenting the acreage of vacant lands with potential residential uses, acreage of vacant lands with potential residential mixed use, and acreage of existing developed sites proposed for mixed use, reuse, or redevelopment. The acreage of vacant land with commercial/industrial uses would also be helpful.** The vacant lands table could also be included in Appendix 5.

Response

The updated Housing Element land use data will be entered into the forecast model as requested. An assessment of housing capacity by type and acreage would be useful and could be assembled in the future as time allows.

2. Appendix 5, Table 6 provides an assessment of residential density by jurisdiction. An expanded analysis of the data would be helpful. For example, it is interesting to note that the City of Goleta provides almost 50% of the 20 units per acre residential densities countywide.

Response

Comment noted and additional analysis included.

3. Appendix 5, Table 4 provides the rate of historic housing construction between 1990 through 2005 by jurisdiction. The purpose of this table is to document housing construction rates in order to provide a more realistic simulation of the potential for residential unit growth. The data for Goleta is limited to the 2000 through 2004 time period to reflect the incorporation date and establishes a 691 unit construction rate over a 5 year period. In the process of preparing the Goleta General Plan, the City completed an analysis of the historic housing construction trends using Census data for the pre-incorporation time period. The pre-incorporation Census data was approximated to reflect the City of Goleta boundary and resulted in an average of **520 units per 5-year time period**. We request that you update Table 4 in Appendix 5 and related text of the Forecast Report as follows:

Historic Housing Trends				
Jurisdiction	1990-1994	1995-1999	2000-2004	
City of Goleta	355	355	691	

5-year Average 1990-2005 **520**

Response

The residential construction rate will be updated to reflect your new data to 520 units per five year period.

Population Forecast

4. As summarized on page 2 of the Administrative Draft Forecast Report, the population forecast

integrates the 2000 Census to estimate population by age group. The 2000 Census data was collected before the City incorporated and does not reflect the City of Goleta boundary. Please include this important detail in the forecast summary on page 2 and anywhere else that is appropriate. As an alternative, consider using the 2005 Department of Finance population data for the City of Goleta, assuming that they provide the detail you require for your model.

Response

The City of Goleta Census data was tabulated from census tract information or data tabulated from the Goleta General Plan so it does reflect the city information.

5. Population projections are presented in a table on page 3 of the Summary. The forecast for the City of Goleta is inconsistent with the data used in the preparation of the Goleta General Plan. The General Plan was based on the previous SBCAG Forecast estimate in 2002 and the 2005 Department of Finance data. We request that you adjust the table as follows:

Population Forecast

Jurisdiction	2005	2010	2015	2020	2025	2030	2035	2040	
City of Goleta	30,290		32,200		33,000		33,400	33,900	34,200
	38,100	38,100							

The population growth revisions provided above change the percent growth factor for Goleta from 30% to 20%. Please revise the text accordingly.

Response

The forecast results are based on your general plan policies and land use capacity not the other way around. The SBCAG forecast does not drive general plan development. Revised input data as provided by your land use element (previous comment) will be used in the forecast model along with other forecast inputs such as household size, employment, labor force to determine the future population levels. The revised draft results are close to prior forecast estimates.

Employment Forecast

6. Revise the last line of page 6 of the Forecast Report Summary to reflect the fact that the Cabrillo Business Park is an approved project. Revise Appendix 4 Table 10 as follows:

Appendix 4 – Edits to Table 10

Goleta City 1,359,687 515,807

Approved

- Old Town Inn 5665 Hollister Ave, Hotel 98
- Fairview Corp Ctr. 420 S Fairview, Gen Ofc. 65,600
- Yardi Systems 5959 Hollister Ave, Gen. Ofc. 44,000
- Yardi Systems 5959 Hollister Ave, Retail 7,850
- ACE-ABLE Indus. 7200 Hollister Ave, Gen. Ofc. 36,427

In Construction

- Old Town Inn 5665 Hollister Ave, Hotel 98
- Farmers Market 7004 Market Place, Retail N/A

Pending

- Costco Gas Station 7095 Marketplace Dr. Retail 10,800
- Town & Country 5669 Calle Real, N/A 2,700
- Hollister Busi. Pk. 7404 Hollister, Gen. Ofc. 130,675
- Cabrillo Busi. Pk. 6767 Hollister Ave, Gen. Ofc. 704,600 **140,000**
- Gordon Mixed Use 345 Pine Ave, Other 3,462
- Tech Dr Indus W side of Tech Dr, Industrial 68,000
- Stokes Industrial Building E. Side of Tech Dr., Industrial

5,000
Pacific Technology 5383 Hollister, Gen. Ofc. 12,040
SB Campus Ctr. 6830 Cortona, R&D 171,526
Fairview Comm Ctr 151 S Fairveiw Ave, Gen. Ofc. 5,460
24 Hr. Fitness 6868 Cortona Dr. Retail 39,754
L Carneros Pt 1 S Los Carneros, Retail 31,051
Fairview Comm Ctr 151 S Fairview Ave, Retail 10,115
Bacara Expansion 8301 Hollister Ave, Hotel 62
Porter Plaza 5955 Calle Real, Retail 5,200
Page Hotel W. side of Kellogg/Ekwill, Hotel 247
University Properties SEC Tech/Thornwood,
Industrial
5,427

The revisions to Table 10 require model adjustments and edits to related text and charts in Appendix 4. Please revise accordingly.

Response

Changes will be made accordingly

Other Comments

The Forecast Report summary and appendices include helpful charts and graphs. In most cases, the Cities of Carpinteria, Santa Barbara, and Goleta, and the unincorporated areas of Toro Canyon, Summerland, Montecito, Isla Vista, and Mission Canyon are combined and presented as the “South Coast Region”. The charts and graphs would be of greater assistance and provide more comparability if data for the three cities were presented as individual data sources. Specifically, the **2040 population distribution pie chart on page 3, the employment forecast bar chart on page 7, the employment forecast tables and bar chart on page 8, and the school enrollment forecast graph on page 13** would benefit from a greater level of detail provided for the South Coast Region.

Response

The detailed data is included in the Appendices. In order to facilitate a summary geographical aggregations were used. Otherwise the summary would be too detailed and information for individual communities may not fit into the proper format, however an attempt to provide more detail will be made.

Pat Sailey Consultant and Co- Author of Regional Impacts of Growth Study

1. Density bonus assumptions – In Appendix 5, p. 3, you say “In addition, density bonus policies are not factored into the buildout assessment.” This is not mentioned in the Executive Summary & it seems to be very important. While there aren’t a lot of large parcels waiting for large housing developments to be proposed, it seems there’s a lot of interest & pressure in providing density bonus units. This doesn’t seem to mesh with the statement that the respective Housing Elements were factored into the forecast & they do assume some density bonus issue. Along the same line, I didn’t notice any reference to the RHNA numbers & wondered if those were included.

Response

Added density bonus definition...An increase in the allowable number of residences granted by the city or county in return for the project's providing low- or moderate-income housing. (see Government Code section 65915)

Requested information from City of SB as an example to determine the total number of units built in a given year, and the proportion of those that were Density Bonus units.

2. Residential on non-residential land – With changing economics, it seems more housing is being proposed & built on land zoned for commercial & industrial use. The Chapala St. corridor & Bermant's development along Los Carneros are two cases in point. Was this trend considered?

Response

The buildout estimates from the housing elements included potential housing from mixed use commercial and industrial zones.

3. School enrollment – The 2005-06 numbers have been finalized for close to a year & the 2006-07 numbers should be soon. At a minimum, I think '06-'07 enrollment should be used in App. 6.

Response

Requested latest enrollment date and am awaiting its release.

4. Commuting info – Again, I didn't read this really carefully but I didn't see much about commuting, especially from Ventura County. #6 on p. 19 has brief reference to it but that's all I saw. In terms of job growth, that seems to be somewhat of a limiting factor as the commute just gets worse & worse.

Response

Staff requested the latest commuter survey data from the SBCAG Traffic Solutions Division; however, the survey results will not be available until May.

5. Jobs-Housing balance – I saw one brief reference to this (p. 19, #6) &, while I recognize that it's hard to define what the 'region' is, it seems more needs to be discussed.

Response

Additional Jobs Housing Balance analysis was completed and added into the report Appendix 4.

6. Santa Maria pop forecast – On p. 3 of the ES, in 2025 Santa Maria's pop comes to a screeching halt at 116,200. That doesn't seem realistic from a purely intuitive standpoint. Surely there'd be some gradual decline in new units, similar to what's happening in the City of SB (at least on residentially zoned land).

Response

The forecast model was rerun with a slightly higher household size at end of forecast period as buildout is approached.

Attachment 2 Revised Text

Appendix 4, Employment Forecast Revised Text

- **Methodology Overview**

A series of steps are taken to forecast employment and are described in detail later in this section. In summary, a countywide employment forecast to the year 2025, developed by the California Economic Forecast Project, is used as a basis for a trend from 2025 to 2040. Employment is then allocated to economic sectors using historical trends of growth in these sectors and some short term estimates of employment by sector from the Employment Development Department (EDD). Countywide employment is then allocated to sub-regions such as the South Coast using data from a commercial vendor, InfoUSA, as well as Zip Code level data from EDD. Forecasts by region are based on short term growth trends from the UCSB Economic Forecast and constrained by general plan land use capacity. The forecasts by region are then allocated to cities and unincorporated areas first based on the location of commercial building permits to 2005, second based on proposed growth, permits, and construction activity to 2010, and, finally based on an average of the 2005-2010 (permits, construction activity, and proposed growth) to 2040.

- Agriculture

Includes those employed in seed production, tree crops, greenhouses, fishing and indirect services such as nurseries. Betteravia Farms in Santa Maria with 308 employees is an example. Based on the most recent Agricultural Production Report from the Santa Barbara Agricultural Commissioners Office there is approximately 997 million dollars in gross agricultural production for 2005 up from 905 million dollars in 2004 with strawberries, wine grapes and broccoli the leading crops. Ventura County was 9th with 1.3 billion and San Luis Obispo County 16th with 539 million of Gross Agricultural production. Currently there is a considerable amount of acreage devoted to crop production. In 2005 the total was 721,709 acres countywide, in vegetables 73,000 acres, field crops 606,000 acres, fruit and nut crops 37,000 acres, nursery products 2,403 acres, and seed crops with 2,106 acres. Wine grapes and broccoli have the greatest harvested acreage at 20,308 and 28,124 respectively. Wine grape acreage particularly has grown significantly over the last reporting period by 3,000 acres. Compared to other counties in the state Santa Barbara County has the 5th largest gross value lettuce crop, the 4th largest strawberry and avocado crop, the 3rd largest celery and cabbage crop, the 2nd largest flower, broccoli, cauliflower crop and the largest squash crop in the state.

The following two tables show the number farms by zip code area, acreage, and value of products sold. The US Department of Agriculture, National Agricultural Statistics 2002 survey is the data source. The information provides a general sense of where agricultural activities are taking place and generally where one might find the most employment in the agricultural sector. It is otherwise difficult to track agricultural workers seasonal employment. The largest agricultural operations of over 1,000 acres are located in the Santa Ynez and Santa Maria zip code areas. Also of note, there are numerous small agricultural operations of one acre or less in the Goleta and Carpinteria zip code areas. The Santa Maria zip code areas also have the majority of agricultural operations with over \$250,000 of agricultural products sold.

2002 Census of Agriculture Farms by Size

Zip Code Area	Farms by size			
	All farms	1 to 49 acres	50 to 999 acres	1,000 acres or more
93463 Solvang	61	46	12	*
93460 Santa Ynez	151	96	44	11
93458 Santa Maria	41	18	21	*
93455 Santa Maria	49	25	20	*
93454 Santa Maria	104	54	31	19
93441 Los Olivos	39	15	20	*
93440 Los Alamos	28	10	11	7
93436 Lompoc	110	49	48	13
93434 Guadalupe	18	*	13	*
93429 Casmalia	*			*
93427 Buellton	39	21	14	*
93254 New Cuyama	22	5	9	8
93117 Goleta	106	70	27	9
93111 Santa Barbara	54	36	17	*
93110 Santa Barbara	50	40	5	5
93109 Santa Barbara	21	18	*	
93108 Santa Barbara	79	65	12	*
93105 Santa Barbara	50	34	13	*
93103 Santa Barbara	15	14	*	
93102 Santa Barbara	*	*		
93101 Santa Barbara	15	6	7	*
93067 Summerland	11	11		
93013 Carpinteria	175	149	25	*

* - Data withheld for categories with one to four farms.
Farm counts for these zip codes are included in the 'State Total' category.
Source: US Department of Agriculture, National Agricultural Statistics Service.

2002 Census of Agriculture Value of All Agricultural Products Sold by Number of Farms and Zip Code Area

Zip Code Area	Total farms	Less than \$50,000	\$50,000 to \$249,999	\$250,000 or more
93463 Solvang	61	47	13	*
93460 Santa Ynez	151	122	15	14
93458 Santa Maria	41	9	*	30
93455 Santa Maria	49	28	12	9
93454 Santa Maria	104	65	15	24
93441 Los Olivos	39	23	10	6
93440 Los Alamos	28	15	12	*
93436 Lompoc	110	85	11	14
93434 Guadalupe	18	*		15
93429 Casmalia	*		*	
93427 Buellton	39	28	*	7
93254 New Cuyama	22	19	*	*
93117 Goleta	106	70	24	12
93111 Santa Barbara	54	31	9	14
93110 Santa Barbara	50	35	8	7
93109 Santa Barbara	21	16	*	*
93108 Santa Barbara	79	65	8	6
93105 Santa Barbara	50	41	*	5
93103 Santa Barbara	15	11	*	*
93102 Santa Barbara	*	*		
93101 Santa Barbara	15	*		11
93067 Summerland	11	6	*	*
93013 Carpinteria	175	96	30	49

* - Data withheld for categories with one to four farms.
Farm counts for these zip codes are included in the 'State Total' category.
Source: US Department of Agriculture, National Agricultural Statistics Service.

- The City of Carpinteria has several new projects. The Lagunitas mixed use project was recently approved and includes 145,000 square feet of Office and R and D space (though the square footage may be reduced to 85,000 square feet). Pending projects include the Rincon Bluffs resort that is zoned for a hotel/resort. It is under review for a project that could include a 92 room hotel, 96 unit Condo Hotel, 26 Bungalows, Wellness Center (11,868 square feet), Meeting Rooms (16,643 square feet), Restaurants (21,750 square feet), Culinary School (5,763 square feet) and Pavillion (4,461 square feet). Lagunitas was recently approved and includes the potential for 300,000 square feet of R and D and residential mixed use, An application is pending for the development of the Veneco Oil and Gas Processing Facility to install an onshore drill rig to access offshore oil and gas resources. Development in the City of Carpinteria that is located within an appeals jurisdiction is subject to review by the California Coastal Commission. All three of the above mentioned projects are appealable to the Commission.

- Employment growth to the city level from 2010 to 2040 is based on an average of the 2000-2010 rate of nonresidential square footage developed. Sources of this data are from the two previous tables and include the SBCAG Congestion Management Program and UCSB Economic Forecast data. The second column of the table shows the estimated land use capacity in square feet. The third column shows the percent of the regions land use capacity and the fourth column shows the new jobs allocated to the jurisdiction.

Table 11
2010-2040 Employment Allocation Distribution,
Based on Average of 2000-2010

Jurisdiction	Total S.F.	% of Total	New Jobs
South Coast Area	2,052,116	100.00%	4,137
City of Carpinteria	104,878	5.11%	211
City of Santa Barbara	1,183,359	57.67%	2,385
City of Goleta	717,637	34.97%	1,447
Unincorporated	46,242	2.25%	93
Lompoc Area	569,804	100.00%	901
City of Lompoc	542,835	95.27%	858
Unincorporated	26,969	4.73%	43
Santa Maria Area	4,337,184	100.00%	3,416
City of Santa Maria	3,998,641	92.19%	3,149
City of Guadalupe	6,000	0.14%	5
Unincorporated	332,543	7.67%	262
Santa Ynez Area	1,043,730	100.00%	547
City of Solvang	86,944	8.33%	46
City of Buellton	745,036	71.38%	390
Unincorporated	211,750	20.29%	111
County Total	8,002,833	100.00%	9,000

An issue that has emerged from the update of local housing and land use plans within Santa Barbara County is the current and future relationship of jobs and housing. During the 1980's for example, commercial growth in the South Coast outpaced residential development activity that was occurring largely away from commercial centers. This relationship has become increasingly important with longer commute times and distances among those who live further from their place of work which influences future transportation demand as it relates to the proximity of jobs and housing. As the jobs/housing imbalance has intensified in recent years, workers have increasingly crowded into the limited available housing on the South Coast, or sought less-expensive housing in northern Santa Barbara and Ventura County. Recent new housing developments in north county are housing a larger proportion of workers from the South Coast.

Benefits from an improved jobs/housing relationship include shortened commute distances and an increase in non-motorized trips such as walking and biking resulting in improved air quality and traffic flow. The relationship between jobs and housing is an ongoing issue as residential and nonresidential development continues into the future. Through its forecast of housing and employment the RGF 2007 provides additional information that can be used to evaluate future changes in the jobs/housing relationship.

There are several definitions of the jobs housing relationship. For example, a 1:1 correlation between jobs and housing units is often cited. This is a neat and simple definition but it does not address the issue of housing affordability, location of jobs relative to housing, the number of workers per household, and other factors.

Housing affordability has become a key factor in housing choice. The table below shows the disparity between median housing prices and median incomes for county jurisdictions tabulated from the 2005 UCSB Economic Forecast. While the median incomes are not significantly different countywide the South Coast housing costs are at least double of what they are in north county.

2005 Median Housing Costs and Household Income

Jurisdiction	Median Housing Cost	Median Household Income
Carpinteria	1,295,000	57,610
Goleta	1,149,898	69,151
Santa Barbara	1,310,000	55,481
Buellton	583,522	58,773
Solvang	640,760	52,778
Lompoc	360,000	41,727
Santa Maria	376,635	42,220
Guadalupe	382,938	39,555

Past research suggests that a ratio within the range of .75 to 1.25 shows a “Balance”. Recent trends that show an increase in dual wage earner households, as women continue to enter the workforce, also influence the ratio since potentially fewer households are needed to accommodate a workforce. Current research suggests that a reasonable upper limit for a jobs housing ratio can be as high as 1.5. A ratio above this could indicate that there may be an insufficient supply of housing to meet the needs of the local workforce.

Defining the regional level at which jobs housing relationships should exist is difficult. An argument could be made, for instance, that the jobs housing relationship exists on a countywide level since this is where most working households have homes. The difficulty is that many of those homes are located so far away from the workers jobs that commuting to or from work requires a disproportionate length of time. The jobs housing relationship must include a sense of limited geographical area. This might lead some to strive for a jobs housing relationship at the city level. As politically distinct geographical units, cities have great potential to influence the relationship between the number and type of jobs through their General Plan.

Figures 9 to 12 show the relationship between jobs and housing for a variety of geographical areas. In **Figure 9** the existing year 2005 relationship is shown for the major county regions. Note the surplus proportion of jobs vs. housing in the South Coast in comparison to the other regions in the county that have a more even proportion of jobs and housing. As a result there is more commuting to the South Coast for jobs.

Figure 9
2005 Jobs, Housing Relationship

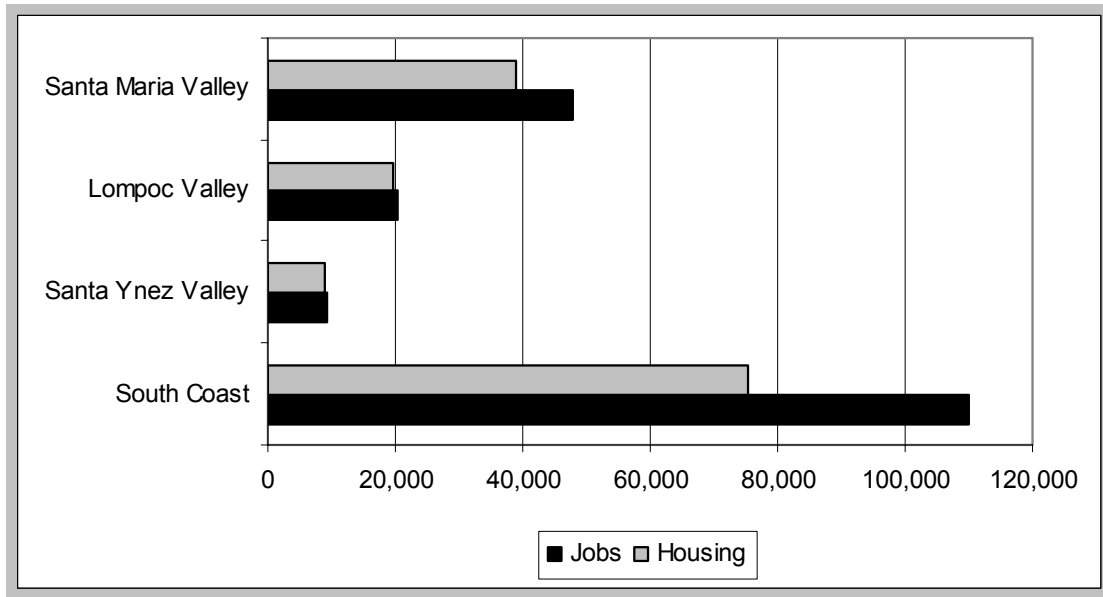


Figure 10 shows the 2040 forecast relationship of jobs and housing resulting in a continuing higher proportion of jobs in the South Coast and an increase in the job proportion in the Santa Maria Valley region. The Lompoc and Santa Ynez Valley regions show more of an even proportion of jobs and housing. Additional workers for vacant jobs not filled by Santa Barbara County residents are assumed to come from San Luis or Ventura Counties.

Figure 10
2040 Jobs, Housing Relationship for Regions



Figure 11 shows the countywide comparison for the number of jobs and housing in 2005 and 2040. The resulting comparison shows a higher proportion of jobs vs. housing in 2040. **Figure 12** shows the increase from 2005 to 2040 in jobs and housing. In some cases the jobs increase is more than double housing increase. The workers per household density increase helps provide some of the additional labor force in the slower growing housing stock.

Figure 11
2005 and 2040 Jobs, Housing Relationship, Countywide

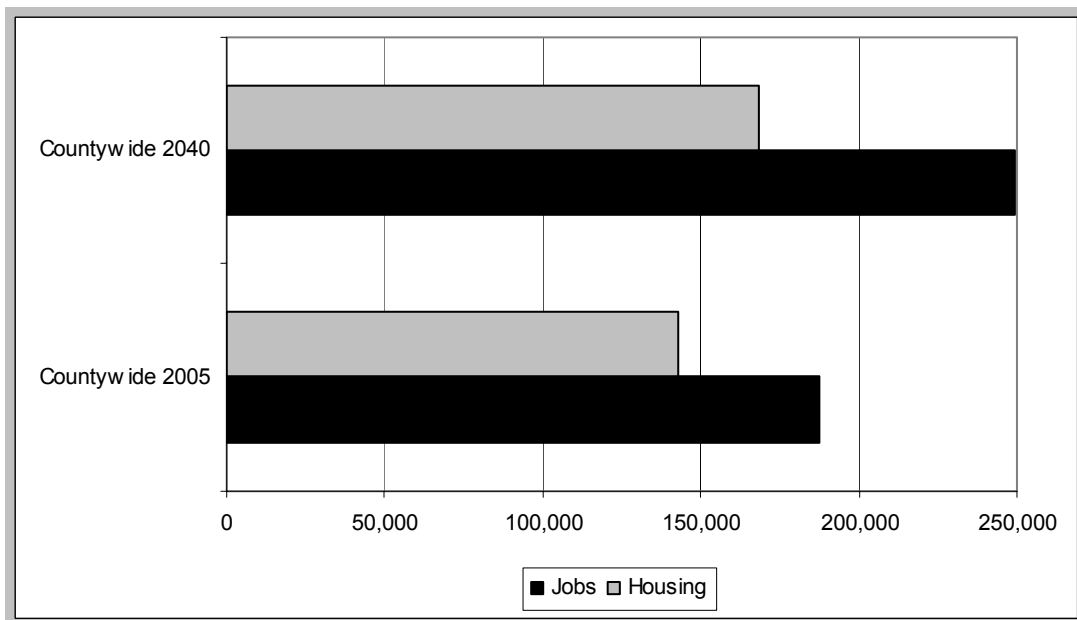


Figure 12
2005-2040 Change in Jobs, Housing

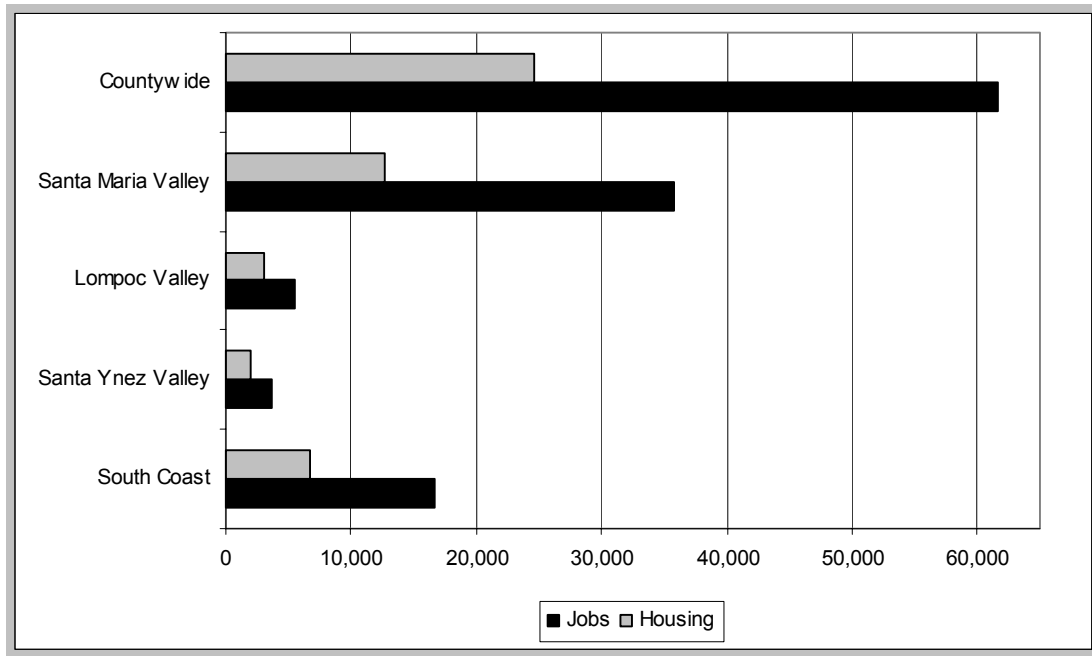


Figure 13 and 14 provide a comparison of the 2005 and 2040 relationship between jobs and workers. Over the forecast period the Santa Maria Valley goes from a worker surplus in 2005 to a job surplus in 2040.

Figure 13
2005 Jobs Worker Relationship

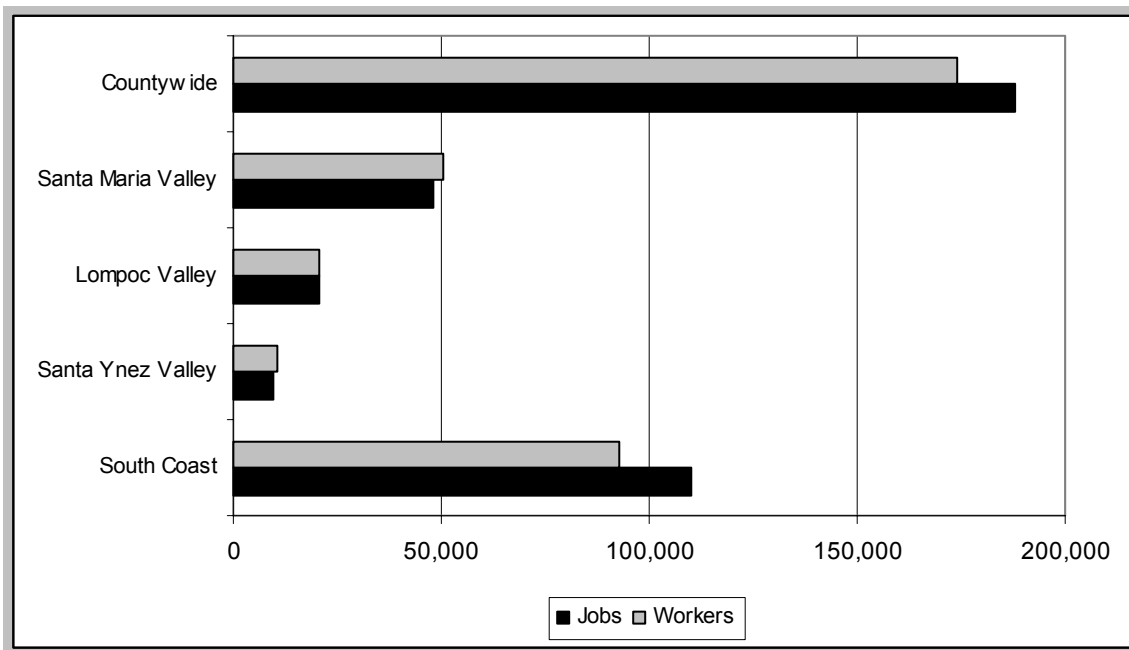


Figure 14
2040 Jobs Worker Relationship

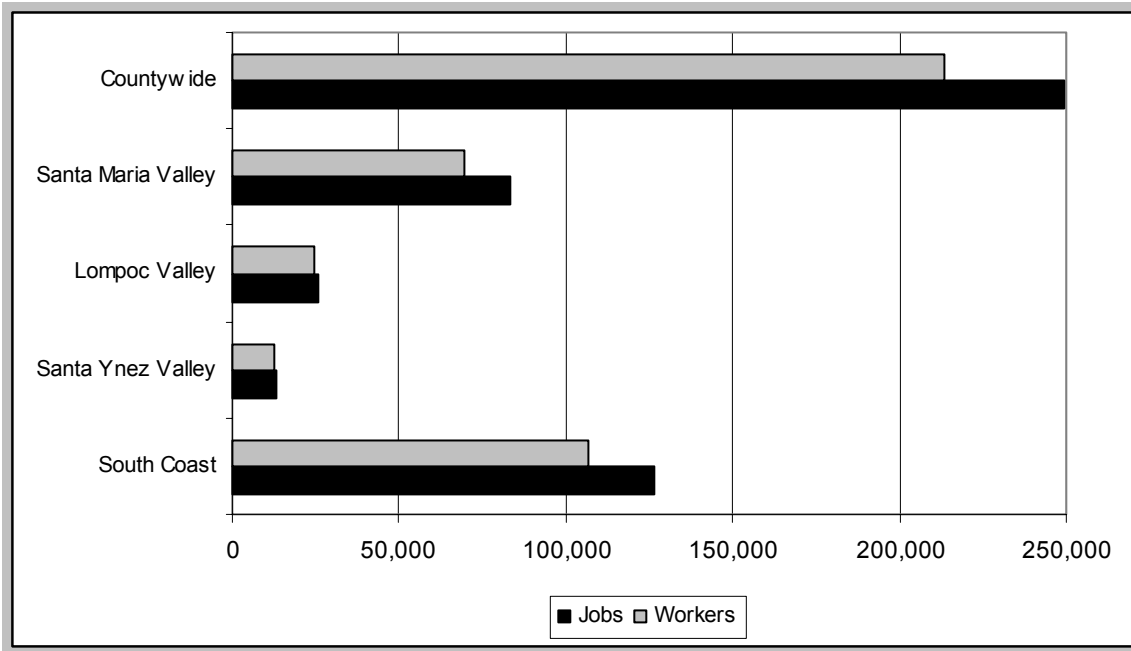


Table 25 shows the forecast jobs housing ratios for all jurisdictions in the county. These ratios are the result of dividing the employment forecast by jurisdiction by the household forecast by jurisdiction. The resulting ratios show the number of jobs per occupied housing unit.

**Table 25
Jobs Housing Ratio**

Jurisdiction	2005	2010	2015	2020	2025	2030	2035	2040
South Coast	1.46	1.49	1.52	1.53	1.55	1.54	1.53	1.53
City of Carpinteria	1.39	1.40	1.44	1.47	1.49	1.48	1.47	1.45
City of Santa Barbara	1.76	1.78	1.80	1.81	1.83	1.84	1.85	1.85
City of Goleta	2.07	2.07	2.10	2.11	2.09	2.02	1.97	1.98
Unincorporated	0.69	0.76	0.77	0.77	0.77	0.77	0.77	0.77
Lompoc Valley	1.07	1.12	1.14	1.16	1.17	1.17	1.17	1.17
City of Lompoc	1.03	1.11	1.13	1.16	1.17	1.17	1.17	1.18
Lompoc - Uninc.	1.16	1.14	1.15	1.16	1.17	1.17	1.17	1.16
Santa Maria Valley	1.22	1.26	1.26	1.24	1.27	1.38	1.49	1.60
City of Santa Maria	1.58	1.59	1.57	1.53	1.56	1.71	1.87	2.04
City of Guadalupe	1.16	1.04	0.97	0.90	0.86	0.84	0.83	0.82
SM - Uninc.	0.44	0.53	0.55	0.56	0.59	0.64	0.68	0.72
Santa Ynez Valley	1.12	1.15	1.16	1.16	1.19	1.21	1.23	1.25
City of Solvang	1.70	1.65	1.61	1.56	1.52	1.48	1.45	1.41
City of Buellton	1.59	1.70	1.74	1.74	1.76	1.77	1.78	1.79
SY - Uninc.	0.69	0.72	0.73	0.75	0.79	0.82	0.86	0.89
County Total	1.32	1.36	1.37	1.37	1.39	1.42	1.45	1.49

Appendix 5, Land Use Availability Revised Text

- Potential units resulting from density bonus policies are not factored into the buildout assessment. Density bonus ordinances permit developers to increase the number of units allowed on a piece of property if they agree to restrict the rents or sales prices on some of the units. Developers can use the additional cash flow from these bonus units to offset the reduced revenue from the affordable units. Density bonus policies are often addressed in Housing Elements that consider the addition of units affordable by lower income households. An increase in the allowable number of residences is granted by the city or county in return for the project's providing low- or moderate-income housing. It is not known on a project by project basis the number of potential density bonus units and as a result they are not factored in. According to representatives of local jurisdictions it is a small percentage of the total units permitted. However, potential units resulting from mixed use zoning are factored in. Mixed use describes a mixed residential-commercial project on a parcel. It can also include a mix of residential, industrial or other uses as well. The housing element provides an assessment of the potential units resulting from mixed use zoning.

**Table 1
Theoretical Potential Additional Residential Units At "Buildout"**

Jurisdiction	Additional Units	Data Sources
South Coast Region	9,614	
City of Carpinteria	853	City of Carpinteria General Plan EIR, Page 15, April 2003
City of Santa Barbara	1,843	City of Carpinteria Draft Housing Element, August 2003. P C-10 Housing Element February 2004, Pages 103-111, February 04 Year 2000 estimate 2,478 Units
City of Goleta	3,880	City of Goleta General Plan, Land Use Element, Page 2-7, Sept. 2006.
Unincorporated Toro Canyon	3,038	David Matson, Comp Planning, Draft Housing Element, Fax, August 4, 2006 Toro Canyon Plan, P. 27 December 2004, 305 Units
Summerland		Summerland Community Plan, P 25, May 1992, 267 Units
Montecito		Montecito Community Plan Update, P. 31 December 1995, 963 Units
Isla VistaUCSB		Faculty and Student Family Housing EIR, April 2004, P 3-8, 387 Units, Student Housing, San Clament, 327 units, Sierra Madre 151 Units
Mission Canyon		N/A
Lompoc Region	4,884	
City of Lompoc	2,992	City of Lompoc Housing Element November, 2003, Pages 76-96
Unincorporated	1,892	Wye Specific Plan, May 2004, Page ES-1 David Matson, Comp Planning, Draft Housing Element, Fax, August 4, 2006
Santa Maria Region	14,409	
City of Santa Maria	9,000	City of S M Buildout Estimate, April 2005, Status of General Plan, 2005
City of Guadalupe	1,389	DJ Farms EIR P. 2-1, November 2005, 1,106 Units City of Guadalupe Housing Element, P. 51, June 2004, 283 Units
Unincorporated Orcutt	3,770	Orcutt Community Plan Page 27, October 2004, 2,997 Units, and Staff Update
Guadalupe	250	David Matson, Comp Planning, Draft Housing Element, Fax, August 4, 2006
Santa Ynez Region	2,819	
City of Solvang	546	Revised Housing Element P 5-5, April 2006
City of Buellton	1,803	Land Use Element, P. LU-17, September 29 2005
Unincorporated Santa Ynez	470	David Matson, Comp Planning, Draft Housing Element, Fax, August 4, 2006 Santa Ynez Valley Community Plan, P 23 - 25, June 2003, 622 units
Los Olivos		Santa Ynez Valley Community Plan, P 23 - 25, June 2003, 209 Units
Ballard		Santa Ynez Valley Community Plan, P 23 - 25, June 2003, 31 Units
Los Alamos		Los Alamos Community Plan, P. 30 March 1994, 784 units
Cuyama Region	500	David Matson, Comp Planning, Draft Housing Element, Fax, August 4, 2006
Countywide	32,226	

**Table 2
Potential for Future
Office, Industrial and Retail Development**

Jurisdiction	Additional Square Footage	Data Sources
South Coast Region	4,490,271	
City of Carpinteria	300,000	City of Carp correspondence with Jackie Campbell, October 3, 2006
City of Santa Barbara	1,932,604	Planning Commission Status Report Page 2
City of Goleta	2,081,000	City of Goleta General Plan, P 2-7, March 2006 Estimate for 2005.
Unincorporated Toro Canyon	176,667	
Summerland		Mont, Summ, Toro Canyon, 37,374--GIS Tax Accessers Data, P and D Aug 2006
Montecito		Las Positas, 5,894--GIS Tax Accessers Data, P and D Aug 2006
Isla Vista\UCSB		Noleta, Mission Canyon, 117,155--GIS Mapping, P and D Aug 2006
Mission Canyon		Isla Visa, 16,244--GIS Tax Accessers Data, P and D Aug 2006 UCSB no net increase, Seizmic upgrades and renewel projects.
Lompoc Region	5,394,526	
City of Lompoc	4,269,000	City Staff, 2001
Unincorporated	1,125,526	Mission Hills\Mesa Oaks, 5,175, 51,174, Lompoc Valley 56,174 Vand. Vill, 151,079--GIS Tax Accessers Data, P and D Aug 2006
Santa Maria Region	15,491,000	
City of Santa Maria	11,976,000	April 2005, Status of General Plan Programs in 2005, Staff update 3/07
City of Guadalupe	380,000	DJ Farms EIR P. 2-1, November 2005
Unincorporated Orcutt Guadalupe	3,135,000	Orcutt 1,888,849, Santa Maria Uninc., 1,063,591, Casmalia 31,481
Santa Ynez Region	2,052,591	
City of Solvang	74,453	Growth Management Ordinance, P. 6, P.C. Hearing October 2005
City of Buellton	1,197,730	Land Use Element, P. LU-17, September 29 2005, Staff update 3/07
Unincorporated Santa Ynez	780,408	
Los Olivos		390,707----GIS Tax Accessers Data, P and D Aug 2006
Ballard		40,968----GIS Tax Accessers Data, P and D Aug 2006
Los Alamos		7,331----GIS Tax Accessers Data, P and D Aug 2006 341,402----GIS Tax Accessers Data, P and D Aug 2006
Cuyama Region	192,909	GIS Tax Accessers Data, P and D Aug 2006
Countywide	27,621,297	

Table 3

Potential Construction Constraints, and Opportunities

Jurisdiction	Annexations-Sphere of Influence	Residential Growth Management	Commercial Growth Management	Water Constraints	Waste Treatment Constraints
South Coast Region					
City of Carpinteria	Ellinwood, 34 Units	No		No	No
City of Santa Barbara	Los Positas, Northside, 60 Units	No	Measure E	No	No
City of Goleta		No	Yes, Policy LU 11	No	No
Unincorporated					
Toro Canyon		No		No	Yes
Summerland		No		No	?
Montecito		Yes		No	No
Isla Vista\UCSB		No		No	No
Mission Canyon		No		No	No
Lompoc Region					
City of Lompoc	Bailey Ave Specific Plan, 270 Acres Purisma Hills, 800 Acres, 1,300 Units	No		No	No
Unincorporated		?		?	?
Santa Maria Region					
City of Santa Maria	Enos-Buss, Bradley Ranch, Quail Run, 6,800 Units	No		No	No
City of Guadalupe	DJ Farms, 1,100 Units	No		No	No
Unincorporated					
Orcutt		No		Yes	No
Guadalupe		No		No	No
Santa Ynez Region					
City of Solvang	Skytt Mesa 169 Units	No		No	No
City of Buellton	Sphere of Influence Study	No		No	No
Unincorporated					
Santa Ynez		No		No	No
Los Olivos		No		No	Yes
Ballard		No		No	?
Los Alamos		No		No	?
Cuyama Region					
		No		No	?

- One of the factors influencing the potential quantity and cost of residential development is the

proposed density of future development as described in their respective Housing Elements and summarized in the following **Table 7**. The information shows the overall mix of low and high density development. The unincorporated portion of the county is zoned for significantly more low than high density residential development in comparison to the cities that have a mix of low and higher housing density. The residential zoning in the unincorporated area reflects the fact that most of the rural and agricultural land in Santa Barbara County is in the unincorporated area, versus the cities which, due to their urban nature, have a more proportionate mix of low and high density housing. For example the City of Goleta has a large proportion of its residential land zoned for over 20 units per acre. Often, however, the as development proposals progress through the review process the density is often reduced. In some cases the data represented in the table below is not entirely consistent with the buildout data in Table 1 due to differing density assumptions etc..

Table 10
Estimated Non-Residential Land Use Consumption,
Compared to Theoretical Buildout 2005-2040

Time Period	South Coast Region	Santa Ynez Valley Region	Lompoc Valley Region	Santa Maria Valley Region	COUNTY TOTAL
2005-2010	1,423,004	346,757	741,685	2,435,296	4,946,742
2010-2015	1,120,145	241,111	391,035	1,611,745	3,364,036
2015-2020	857,348	172,802	476,218	974,810	2,481,177
2020-2025	782,232	241,111	402,003	2,303,456	3,728,802
2025-2030	195,609	209,692	256,108	3,022,491	3,683,901
2030-2035	240,552	209,692	256,108	3,327,471	4,033,823
2035-2040	197,138	209,692	256,108	2,366,702	3,029,640
Change 2005-2040	4,816,027	1,630,858	2,779,265	16,041,970	25,268,121
Theoretical Buildout	4,490,271	2,081,994	5,394,526	15,491,000	27,457,791
Difference	(325,756)	451,136	2,615,261	(550,970)	2,189,670

- The remaining unincorporated South Coast areas of Toro Canyon Montecito and Goleta Valley are already characterized by low proportions of Hispanic households and limited overcrowding so the household size trend is forecast to be constant.

Jurisdiction	2005	2010	2015	2020	2025	2030	2035	2040
South Coast	2.58	2.55	2.55	2.54	2.55	2.55	2.55	2.55
City of Carpinteria	2.81	2.76	2.75	2.75	2.75	2.74	2.73	2.73
City of Santa Barbara	2.45	2.42	2.41	2.40	2.40	2.41	2.41	2.41
City of Goleta	2.70	2.65	2.65	2.65	2.65	2.65	2.65	2.65
Carp. - Uninc.	2.59	2.59	2.59	2.59	2.59	2.59	2.59	2.59
SB - Uninc.	2.68	2.68	2.68	2.68	2.68	2.68	2.68	2.68
Lompoc Valley	2.85	2.88	2.88	2.90	2.91	2.93	2.94	2.94
City of Lompoc	2.85	2.89	2.90	2.92	2.94	2.96	2.98	2.98
Lompoc - Uninc.	2.85	2.85	2.85	2.85	2.85	2.85	2.85	2.85
Santa Maria Valley	3.25	3.24	3.25	3.26	3.26	3.27	3.28	3.29
City of Santa Maria	3.39	3.36	3.36	3.36	3.36	3.36	3.38	3.39
City of Guadalupe	3.99	4.04	4.06	4.08	4.10	4.10	4.10	4.10
SM - Uninc.	2.85	2.85	2.85	2.86	2.86	2.86	2.86	2.87
Guad. - Uninc.	3.57	3.57	4.54	4.48	4.42	4.37	4.33	4.29
Santa Ynez Valley	2.59	2.59	2.59	2.58	2.58	2.58	2.58	2.58
City of Solvang	2.36	2.37	2.35	2.33	2.32	2.32	2.32	2.32
SY - Uninc.	2.68	2.68	2.68	2.68	2.68	2.68	2.68	2.68
City of Buellton	2.66	2.64	2.64	2.64	2.64	2.64	2.64	2.64
Cuyama Valley	2.85	2.85	2.86	2.86	2.87	2.87	2.88	2.88
Countywide	2.80	2.79	2.80	2.81	2.82	2.83	2.83	2.84

Cities and County updated to DOF 2005 Estimates.

- Household size links the forecast populations with the housing supply through a household forecast. The forecast of households is estimated by dividing projected household population by forecast household size. For forecasting purposes, new households are equated with new housing unit demand. Vacant units or vacancy rates are not considered in the household forecast as households are by definition considered occupied housing units.

Table 13

Household Forecast

Jurisdiction	2005	2010	2015	2020	2025	2030	2035	2040	2005- 2040
South Coast	75,449	76,611	77,845	79,079	79,940	80,620	80,799	80,959	5,509
City of Carpinteria	5,047	5,114	5,189	5,264	5,339	5,414	5,489	5,564	517
City of Santa Barbara	35,931	36,449	37,003	37,557	37,738	37,738	37,738	37,738	1,807
City of Goleta	11,353	11,844	12,364	12,884	13,404	13,924	13,943	13,943	2,590
Carp. -Uninc.	1,981	2,001	2,021	2,041	2,061	2,081	2,101	2,121	140
SB -Uninc.	21,139	21,204	21,269	21,334	21,399	21,464	21,529	21,594	455
Lompoc Valley	19,484	19,911	20,342	20,773	21,204	21,635	22,066	22,497	3,013
City of Lompoc	13,446	13,770	14,097	14,424	14,751	15,078	15,405	15,732	2,285
Lompoc -Uninc.	6,037	6,141	6,245	6,349	6,453	6,557	6,661	6,765	728
Santa Maria Valley	38,980	41,742	44,509	47,276	50,043	51,091	51,713	52,335	13,355
City of Santa Maria	25,465	27,610	29,755	31,900	34,045	34,471	34,471	34,471	9,006
City of Guadalupe	1,574	1,768	1,962	2,156	2,350	2,544	2,738	2,932	1,358
SM -Uninc.	11,818	12,231	12,649	13,067	13,485	13,903	14,321	14,739	2,921
Guad. -Uninc.	123	133	143	153	163	173	183	193	70
Santa Ynez Valley	8,755	9,160	9,561	9,904	10,129	10,354	10,579	10,804	2,048
City of Solvang	2,223	2,301	2,378	2,455	2,532	2,609	2,686	2,763	540
SY -Uninc.	4,828	5,007	5,183	5,301	5,301	5,301	5,301	5,301	472
City of Buellton	1,704	1,852	2,000	2,148	2,296	2,444	2,592	2,740	1,036
Cuyamaca Valley	470	538	593	616	665	722	814	947	477
County Total	143,138	147,961	152,849	157,648	161,981	164,422	165,970	167,542	24,403

Table 14

Household Forecast Change

Jurisdiction	2000- 2005	2005- 2010	2010- 2015	2015- 2020	2020- 2025	2025- 2030	2030- 2035	2035- 2040	2005- 2040
South Coast	1,947	1,161	1,234	1,234	861	680	179	160	5,509
City of Carpinteria	58	67	75	75	75	75	75	75	517
City of Santa Barbara	381	518	554	554	181	-	-	-	1,807
City of Goleta	720	491	520	520	520	520	19	-	2,590
Carp. -Uninc.	85	20	20	20	20	20	20	20	140
SB -Uninc.	703	65	65	65	65	65	65	65	455
Lompoc Valley	565	427	431	431	431	431	431	431	3,013
City of Lompoc	369	323	327	327	327	327	327	327	2,285
Lompoc -Uninc.	196	104	104	104	104	104	104	104	728
Santa Maria Valley	3,711	2,762	2,767	2,767	2,767	1,048	622	622	13,355
City of Santa Maria	3,316	2,145	2,145	2,145	2,145	426	-	-	9,006
City of Guadalupe	159	194	194	194	194	194	194	194	1,358
SM -Uninc.	226	413	418	418	418	418	418	418	2,921
Guad. -Uninc.	10	10	10	10	10	10	10	10	70
Santa Ynez Valley	460	404	401	343	225	225	225	225	2,048
City of Solvang	38	78	77	77	77	77	77	77	540
SY -Uninc.	151	178	176	118	-	-	-	-	472
City of Buellton	271	148	148	148	148	148	148	148	1,036
Cuyama Valley	57	68	55	23	49	57	92	133	477
County Total	6,739	4,823	4,888	4,798	4,333	2,441	1,549	1,571	24,403