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.
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

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

SANDAG estimate

Table 2
Population Age Distribution, 1997

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

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

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

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
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)

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

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

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

Bureau of Labor Statistics

Table 8  
SANDAG Forecasts of Employment, San Diego Region

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

<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Total Acres</strong></td>
<td>2,726,715</td>
<td>2,725,715</td>
<td>2,726,715</td>
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<tr>
<td><strong>Developed Acres</strong></td>
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<td>1,469,736</td>
<td>1,488,765</td>
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<tr>
<td>Low Density Single Family</td>
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<td>Other Residential</td>
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<tr>
<td><strong>Industrial</strong></td>
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<td>27,998</td>
<td>28,253</td>
<td>29,314</td>
<td>29</td>
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<tr>
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<td>35,898</td>
<td>36,567</td>
<td>38,584</td>
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<td>62</td>
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<td>11,395</td>
<td>11,902</td>
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<td>105,486</td>
<td>107,180</td>
<td>108,167</td>
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<tr>
<td>Agricultural and Extractive</td>
<td>214,810</td>
<td>199,152</td>
<td>188,792</td>
<td>165,930</td>
<td>-23</td>
</tr>
<tr>
<td>Parks and Military Use</td>
<td>830,292</td>
<td>830,214</td>
<td>830,206</td>
<td>830,143</td>
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<tr>
<td><strong>Vacant Developable Acres</strong></td>
<td>503,709</td>
<td>459,153</td>
<td>440,123</td>
<td>356,581</td>
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<tr>
<td>Low Density Single Family</td>
<td>450,739</td>
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<td>419,110</td>
<td>348,987</td>
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<td>609</td>
<td>333</td>
<td>-74</td>
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<tr>
<td>Roads &amp; Freeways</td>
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<td>1,516</td>
<td>657</td>
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<tr>
<td><strong>Constrained Acres</strong></td>
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<td>797,827</td>
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Economic Impact Evaluation, Market Creek Plaza  10
Institute for Real Estate, University of San Diego
### Table 10
SANDAG Forecasts of Employment, City of San Diego

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<tbody>
<tr>
<td><strong>Population</strong></td>
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<td>1,403,874</td>
<td>1,499,437</td>
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<td><strong>Total Employment</strong></td>
<td>645,159</td>
<td>780,148</td>
<td>801,216</td>
<td>869,977</td>
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<tr>
<td><strong>Civilian Employment</strong></td>
<td>606,561</td>
<td>747,084</td>
<td>768,152</td>
<td>836,913</td>
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</tr>
<tr>
<td>Manufacturing</td>
<td>70,161</td>
<td>78,940</td>
<td>74,335</td>
<td>71,828</td>
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<td>28,370</td>
<td>28,845</td>
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<tr>
<td>Wholesale Trade</td>
<td>21,437</td>
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<td>33,698</td>
<td>40,919</td>
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<tr>
<td>Retail Trade</td>
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<td>45,209</td>
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<td>55,003</td>
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<td>237,326</td>
<td>245,831</td>
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<td>138,994</td>
<td>144,385</td>
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<tr>
<td>Agriculture, Construction, Self-employed</td>
<td>62,473</td>
<td>80,084</td>
<td>82,955</td>
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<td>47</td>
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<td><strong>Military</strong></td>
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### Table 11
SANDAG Forecasts of Land Use, City of San Diego

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<td>173,726</td>
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<td>509</td>
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<td>279</td>
<td>-45</td>
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<tr>
<td>Other Residential</td>
<td>359</td>
<td>357</td>
<td>357</td>
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<tr>
<td><strong>Industrial</strong></td>
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<td>12,546</td>
<td>12,615</td>
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<td>Roads &amp; Freeways</td>
<td>30,762</td>
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<td>15,939</td>
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<td>64</td>
<td>-98</td>
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<td>957</td>
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<td>-100</td>
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<tr>
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<tr>
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<tr>
<td>Office</td>
<td>594</td>
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<td>283</td>
<td>141</td>
<td>-76</td>
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<tr>
<td>Schools</td>
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<td>25,555</td>
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</table>
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

<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Population</strong></td>
<td>151,507</td>
<td>165,148</td>
<td>172,094</td>
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<td><strong>Total Employment</strong></td>
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<td>17,545</td>
<td>18,788</td>
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<tr>
<td><strong>Civilian Employment</strong></td>
<td>15,010</td>
<td>17,101</td>
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<td>Manufacturing</td>
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<td>1,193</td>
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<td>Transportation,</td>
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<td>990</td>
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<tr>
<td>Communication,</td>
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<tr>
<td>Utilities</td>
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<td>Wholesale Trade</td>
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<tr>
<td>Construction, Self-employed</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td><strong>Military</strong></td>
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<td>0</td>
<td>0</td>
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</tr>
</tbody>
</table>
Table 13
SANDAG Forecasts of Land Use, Sub-regional Area 5 – Southeast San Diego

<table>
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<td><strong>Total Acres</strong></td>
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<td><strong>Developed Acres</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Low Density Single Family</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>0</td>
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<tr>
<td>Single Family</td>
<td>5,769</td>
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<td>5,832</td>
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<td>65</td>
<td>26</td>
<td>-67</td>
</tr>
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<td>10</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td><strong>Industrial</strong></td>
<td>180</td>
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<td>148</td>
<td>-18</td>
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<td><strong>Commercial/Services</strong></td>
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<td><strong>Vacant Developable Acres</strong></td>
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<td></td>
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<td>4</td>
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<td>0</td>
<td>0</td>
<td>-4</td>
</tr>
<tr>
<td>Roads &amp; Freeways</td>
<td>83</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>-100</td>
</tr>
<tr>
<td><strong>Constrained Acres</strong></td>
<td>499</td>
<td>499</td>
<td>499</td>
<td>499</td>
<td>0</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Category</th>
<th>San Diego</th>
<th>All Western Region</th>
<th>Selected Income Groups from National Surveys</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>MSA</td>
<td></td>
<td>$15,000 to $19,999</td>
</tr>
<tr>
<td>Food</td>
<td>0.12</td>
<td>0.14</td>
<td>0.16</td>
</tr>
<tr>
<td>Alcohol</td>
<td>0.01</td>
<td>0.01</td>
<td>0.01</td>
</tr>
<tr>
<td>Housing</td>
<td>0.40</td>
<td>0.31</td>
<td>0.34</td>
</tr>
<tr>
<td>Apparel</td>
<td>0.04</td>
<td>0.05</td>
<td>0.05</td>
</tr>
<tr>
<td>Transportation</td>
<td>0.16</td>
<td>0.18</td>
<td>0.18</td>
</tr>
<tr>
<td>Health care</td>
<td>0.05</td>
<td>0.05</td>
<td>0.08</td>
</tr>
<tr>
<td>Entertainment</td>
<td>0.05</td>
<td>0.05</td>
<td>0.04</td>
</tr>
<tr>
<td>Personal care</td>
<td>0.02</td>
<td>0.02</td>
<td>0.02</td>
</tr>
<tr>
<td>Reading</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Education</td>
<td>0.02</td>
<td>0.02</td>
<td>0.01</td>
</tr>
<tr>
<td>Tobacco</td>
<td>0.00</td>
<td>0.01</td>
<td>0.01</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>0.02</td>
<td>0.02</td>
<td>0.03</td>
</tr>
<tr>
<td>Cash gifts</td>
<td>0.02</td>
<td>0.03</td>
<td>0.03</td>
</tr>
<tr>
<td>Personal ins</td>
<td>0.10</td>
<td>0.11</td>
<td>0.04</td>
</tr>
</tbody>
</table>

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.

Economic Impact Evaluation, Market Creek Plaza
Institute for Real Estate, University of San Diego
Table 15
Spending by Census Tract
Adjusting spending to reflect income completely, (millions of dollars)

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

Table 16
Demand and Supply for Retail Services

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>Number of jobs</th>
<th>Hours</th>
<th>Wages</th>
<th>Wage bill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction jobs</td>
<td>360</td>
<td>1000</td>
<td>$22.00</td>
<td>$7,920,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Retail</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Food 4 Less</td>
<td>100</td>
<td>2080</td>
<td>$15.00</td>
<td>$3,120,000</td>
</tr>
<tr>
<td>Fast Food</td>
<td>40</td>
<td>2080</td>
<td>7.00</td>
<td>582,400</td>
</tr>
<tr>
<td>Retail Shops</td>
<td>46</td>
<td>2080</td>
<td>8.00</td>
<td>765,440</td>
</tr>
<tr>
<td>Multipurpose Center</td>
<td>4</td>
<td>2080</td>
<td>10.00</td>
<td>83,200</td>
</tr>
<tr>
<td>Office Complex</td>
<td>1600</td>
<td>2080</td>
<td>15.00</td>
<td>$49,920,000</td>
</tr>
</tbody>
</table>

Table 19
Market Creek Plaza Project: Sales Revenue

<table>
<thead>
<tr>
<th></th>
<th>Square Feet</th>
<th>Revenue per square foot</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food 4 Less</td>
<td>60,000</td>
<td>$250</td>
<td>$15,000,000</td>
</tr>
<tr>
<td>Fast Food</td>
<td>7,300</td>
<td>$300</td>
<td>$2,190,000</td>
</tr>
<tr>
<td>Restaurant</td>
<td>4,700</td>
<td>$250</td>
<td>$1,175,000</td>
</tr>
<tr>
<td>Retail Shops</td>
<td>35,000</td>
<td>$200</td>
<td>$7,000,000</td>
</tr>
<tr>
<td>Office Complex</td>
<td>220,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Incubator</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail</td>
<td>15,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office</td>
<td>20,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kiosks</td>
<td>1,400</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>383,400</strong></td>
<td><strong>$25,365,000</strong></td>
<td></td>
</tr>
</tbody>
</table>

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

Economic Impact Evaluation, Market Creek Plaza
Institute for Real Estate, University of San Diego
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

<table>
<thead>
<tr>
<th>Address</th>
<th>Business</th>
<th>Employees</th>
<th>Type of Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>3676</td>
<td>burger king</td>
<td>20-49</td>
<td>retail-eating places</td>
</tr>
<tr>
<td>3751</td>
<td>mount hope cemetery</td>
<td>10-19</td>
<td>cemetery</td>
</tr>
<tr>
<td>3939</td>
<td>angelica textiles rental</td>
<td>250-499</td>
<td>Home health care services</td>
</tr>
<tr>
<td>4001</td>
<td>fleet supply</td>
<td>10-19</td>
<td>wholesale auto parts</td>
</tr>
<tr>
<td>4001</td>
<td>lighthouse</td>
<td>5-9</td>
<td>manufacturing-vehicular lighting eq</td>
</tr>
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## Business Listings from Major Streets
### In the Market Creek Plaza Study Area

#### N. Euclid

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### Appendix 1A, cont.

**Business Listings from Major Streets**

**In the Market Creek Plaza Study Area**

<table>
<thead>
<tr>
<th>Address</th>
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<td>service-beauty shops</td>
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## Appendix 1A, cont.

### Business Listings from Major Streets

In the Market Creek Plaza Study Area

<table>
<thead>
<tr>
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<th>Employees</th>
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<td>health-kidney dialysis centers</td>
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<td>720</td>
<td>sharp skins</td>
<td>5-9</td>
<td>manufacturing-automotive and apparel</td>
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<td>770</td>
<td>Westerfield</td>
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<td>manufacturing-commercial lighting fixtures</td>
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<td>Hrp</td>
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<td>10-19</td>
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<td>govt-admin of social and manpower</td>
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## Appendix 1A, cont.

### Business Listings from Major Streets

**In the Market Creek Plaza Study Area**

<table>
<thead>
<tr>
<th>Address</th>
<th>Business</th>
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<th>Type of Business</th>
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<tbody>
<tr>
<td>4006</td>
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<td>3-4</td>
<td>recreation-amusement</td>
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<tr>
<td>4444</td>
<td>sign tech</td>
<td>50-99</td>
<td>manufacturing-signs and advertising</td>
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<td>construction-excavating</td>
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<td>a-american business center</td>
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<td>retail-eating places</td>
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### Appendix 1B

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

1996

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<th>Employment Category</th>
<th>Executive, admin. and managerial</th>
<th>Professional specialty</th>
<th>Technical and related support</th>
<th>Sales</th>
<th>Administrative support, including clerical</th>
<th>Service</th>
<th>Precision production, craft, and repair</th>
<th>Operators, fabricators, and laborers</th>
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<td>12.8</td>
<td>11.4</td>
<td>3.5</td>
<td>13.5</td>
<td>14.7</td>
<td>13.8</td>
<td>11.8</td>
<td>17.9</td>
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<td></td>
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<td>7.2</td>
<td>3.5</td>
<td>1.9</td>
<td>8.5</td>
<td>1.3</td>
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<td>26.7</td>
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<td>1.3</td>
<td>18.9</td>
<td>40.9</td>
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<td>9.5</td>
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<td>22.3</td>
<td>37.9</td>
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<td>5.2</td>
<td>11.1</td>
<td>1.5</td>
<td>14.0</td>
<td>45.3</td>
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<td>Transportation and public utilities</td>
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<td>21.4</td>
<td>2.9</td>
<td>14.7</td>
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<td>1.2</td>
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<td>16.5</td>
<td>1.1</td>
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<td>7.7</td>
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<td>0.9</td>
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<td>3.6</td>
<td>7.7</td>
<td>16.3</td>
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*Monthly Labor Review, Feb., 1998*

### Appendix 1C

Average Hourly Earnings

1996

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<th>Employment Category</th>
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<td>15.61</td>
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<tr>
<td>Construction</td>
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<td>Durable goods</td>
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<td>Non-durable goods</td>
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<td>Transportation and public utilities</td>
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<td>Retail Trade</td>
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<td>Finance, insurance, real estate</td>
<td>12.79</td>
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### Appendix 1D

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

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<td>Hotels and other lodging places</td>
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<td>Auto repair, services, and parking</td>
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<td>Miscellaneous repair services</td>
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<td>Motion pictures</td>
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<tr>
<td>Amusement and recreation services</td>
<td>8.82</td>
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<td>Health services</td>
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<td>Legal services</td>
<td>16.60</td>
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<tr>
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<td>8.55</td>
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<td>Engineering and management services</td>
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</table>

*Monthly Labor Review, Feb., 1998*

### Appendix 1E

**Covered by Health Plan April 1993**

<table>
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<tr>
<th>Sector</th>
<th>Percent of employed</th>
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<td>Private wage and salary workers</td>
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<td>Services</td>
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<td>26.8</td>
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<tr>
<td>Mining</td>
<td>83.1</td>
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<tr>
<td>Construction</td>
<td>43.1</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>79.8</td>
</tr>
<tr>
<td>Durable goods</td>
<td>84.5</td>
</tr>
<tr>
<td>Non-durable goods</td>
<td>73.6</td>
</tr>
<tr>
<td>Transportation and public utilities</td>
<td>77.0</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>72.2</td>
</tr>
<tr>
<td>Retail trade</td>
<td>38.4</td>
</tr>
<tr>
<td>Finance, Insurance, Real Estate</td>
<td>67.8</td>
</tr>
</tbody>
</table>

*Monthly Labor Review, Feb., 1998*
### Appendix 1F

**Participation in Employer Sponsored Retirement Plan**

*April 1993*

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

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### Appendix 1G

**Coverage Under Short- and Long-term Disability Plans**

*April 1993*

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

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Appendix 1H

Contingent Workers
Feb 1995

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

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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

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

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.
## Nonfatal Occupational Injury 1995

<table>
<thead>
<tr>
<th>Sector</th>
<th>Per 100 full-time equivalent workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total private</td>
<td>8.1</td>
</tr>
<tr>
<td>Services</td>
<td>6.4</td>
</tr>
<tr>
<td>Agriculture</td>
<td>9.7</td>
</tr>
<tr>
<td>Mining</td>
<td>6.2</td>
</tr>
<tr>
<td>Construction</td>
<td>10.6</td>
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<tr>
<td>Manufacturing</td>
<td>11.6</td>
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<tr>
<td>Durable goods</td>
<td>12.8</td>
</tr>
<tr>
<td>Non-durable goods</td>
<td>9.9</td>
</tr>
<tr>
<td>Transportation and public utilities</td>
<td>9.1</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>7.5</td>
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<tr>
<td>Retail trade</td>
<td>7.5</td>
</tr>
<tr>
<td>Finance, Insurance, Real Estate</td>
<td>2.6</td>
</tr>
</tbody>
</table>

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