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SCEDC
South County Economic
Development Council

South County Economic Development Council

Visioning Survey

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Introduction

As part of the South County Visioning Project, the South County Economic Development Council (SCEDC) conducted a survey to poll residents, workers, and visitors in and around South County regarding economic strategies the SCEDC should pursue over the next five years. The survey described investment strategies and specific actions aimed at building an economically prosperous South County, and asked respondents to state the importance of these strategies and actions. Four strategies were tested:

1. Invest in Emerging Industries
2. Invest in People
3. Invest in Neighborhoods
4. Invest in Moving People and Goods

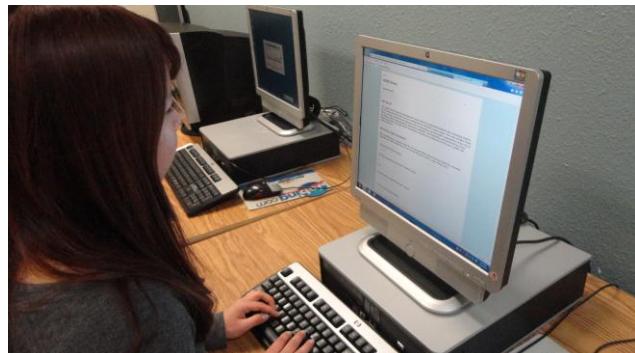
In general, respondents were asked to rate the level of importance (i.e., very, somewhat, or not) of a strategy or action, or to prioritize among given options. Included were questions regarding the age, race, city of residence, and other statistical information to better understand the demographic profile of those taking the survey. Respondents were also given the option to “decline to state” any of the demographic questions.

The goal of the South County Visioning Project is to create a regional vision and pathway to prosperity built on investment opportunities and job creation resulting in a more marketable and economically viable South County. In order to produce a sound and viable economic vision, the SCEDC will use the information gathered from the survey to create the economic strategies the region will focus on in the next five years. The survey also served to engage the community, encourage input, and foster participation in shaping the future of South County.



How the Survey was Conducted

SCEDC staff conducted the Visioning Survey from June 2013 through November 2013. The goal for the SCEDC was to conduct at least 4,000 surveys. In order to reach that goal, the survey was advertised in several ways, including on the SCEDC's Facebook page, the SCEDC Visioning Project website, the SCEDC website, in local newspapers, and by making presentations about the survey to local





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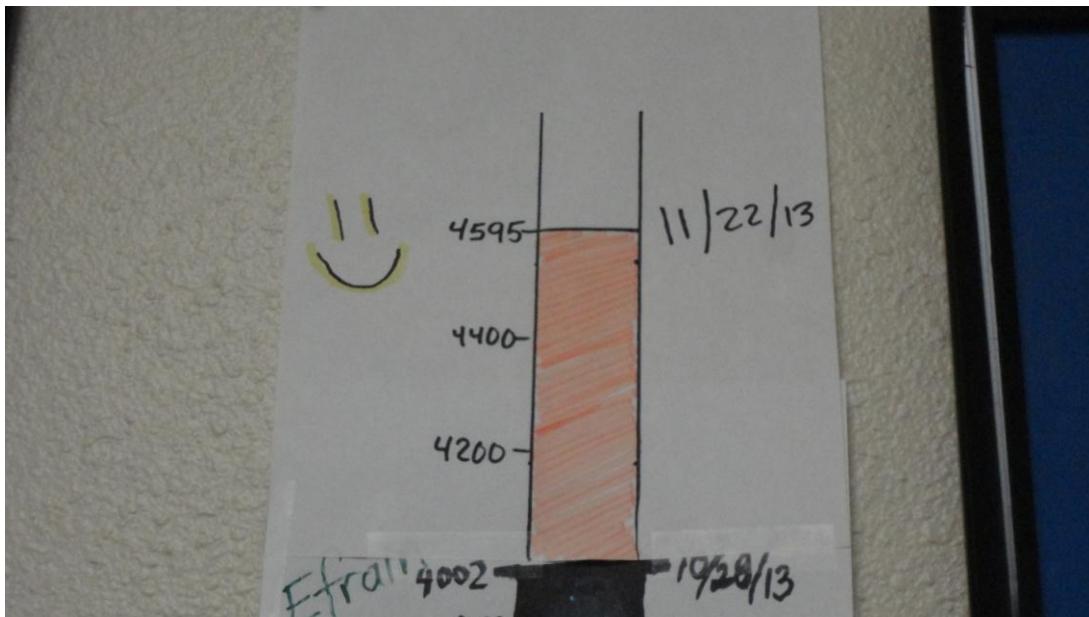
organizations such as Chambers of Commerce, Economic Development Corporations, and City Councils.

The SCEDC survey team consisted of student interns from San Diego County universities such as University of San Diego, University of California, San Diego, and San Diego State University. Surveys were offered in-person, by hard copy, and through an online service. In order to accommodate the multi-lingual character of South County, surveys were offered in-person in the following languages:

- American Sign Language
- Barawa
- English
- Korean
- Kurdish
- Mandarin
- Portuguese
- Somali
- Spanish
- Swahili
- Tagalog

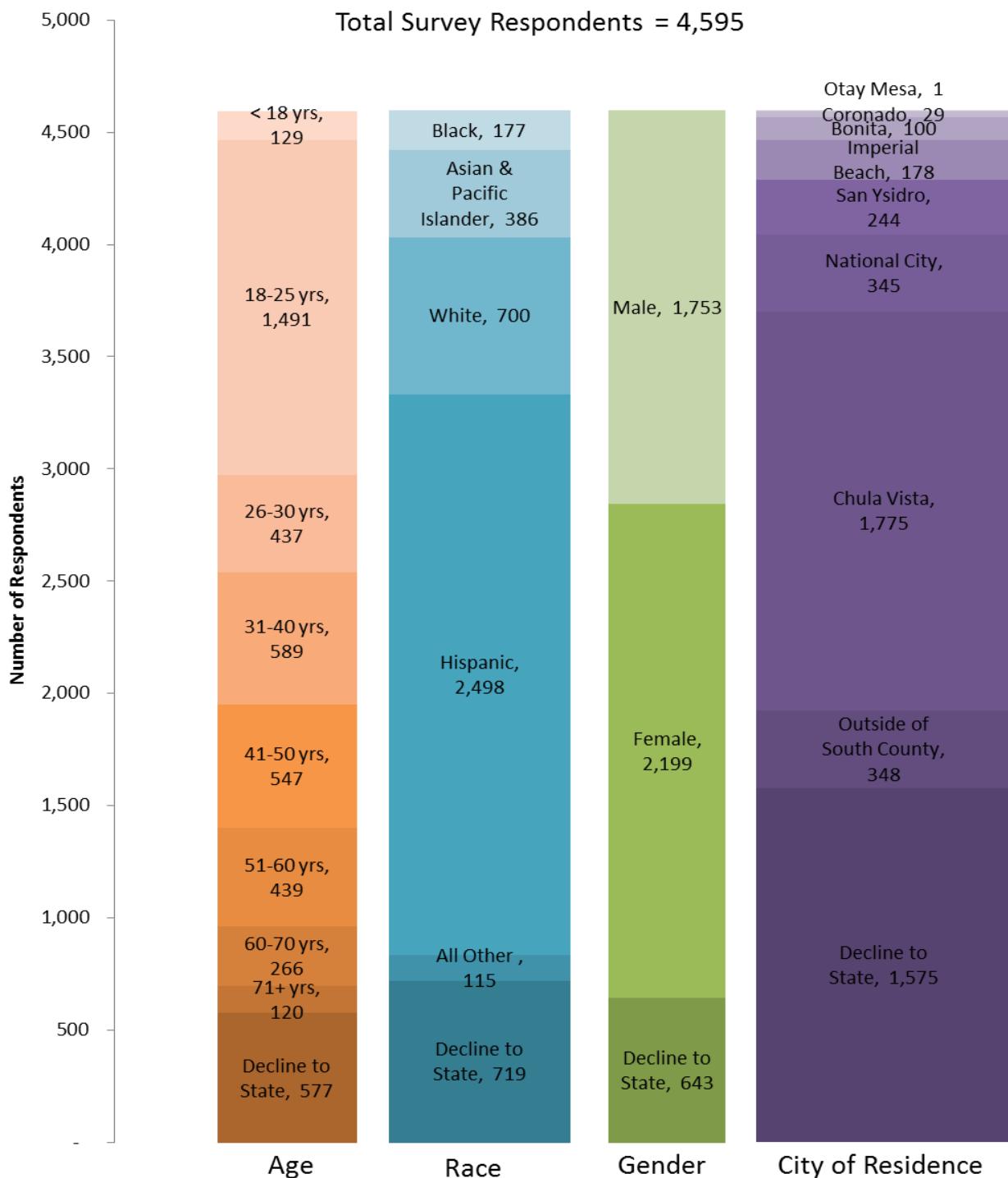
In addition to the in-person survey languages, online and hard copy surveys were also provided in both the English and Spanish languages.

The in-person surveys were conducted at local trolley stations, shopping centers, Southwestern College campuses, and the South County Career Center. In all, the SCEDC surpassed their original goal by conducting 4,595 surveys altogether.





Who Took the Survey?





Are Survey Respondents Representative of South County In General?

The demographic profile of survey respondents was very similar to the profile of South County overall with a few exceptions: younger persons were over-represented while older persons were under represented; and residents of Otay Mesa and Coronado were under-represented. Other subgroups by age, ethnicity, and geography were closer, but not exact. To account for the variations, a normalization

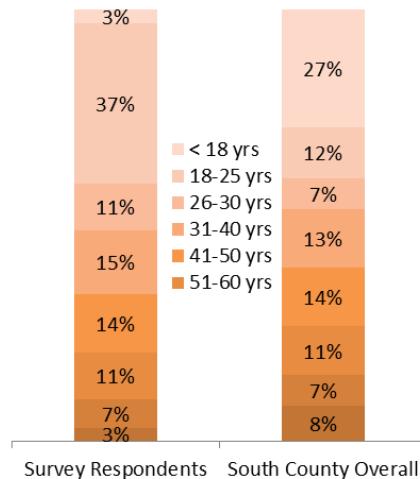
methodology (see Appendix A) was applied to adjust the responses, thus providing a more representative estimate for the actual population of South County.

The adjusted results are not materially different from the gross results. Since almost half of the survey respondents (40%, or 1,854 of 4,595) reside outside of South County, the results suggest that the opinions and preferences of South County residents are similar to non-residents who visit South County. However, due to a lack of data, we are unable to execute the normalization methodology to the non-resident respondents; thus we are unable to perform an apples-to-apples comparison between representative estimates of South County residents and non-residents who visit South County.

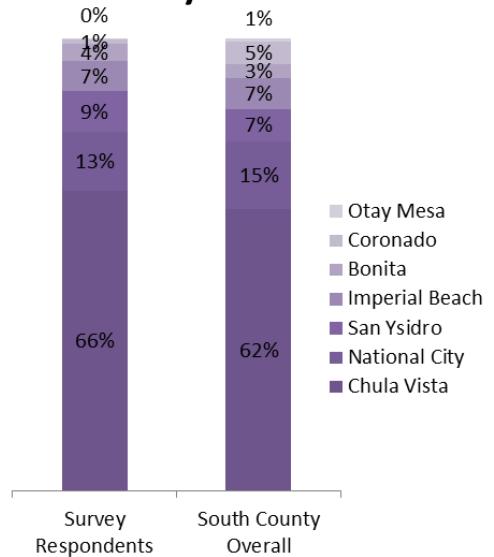
Respondents who self-identified as non-residents of South County were asked to state their reasons for visiting the area. The results are as follows:

Visit family & friends	39%
Buy goods	28%
Buy services	26%
Invest in South County	7%

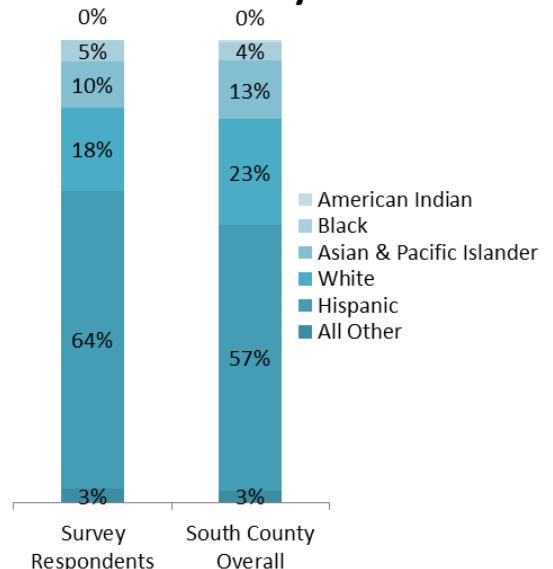
Age



City of Residence



Ethnicity





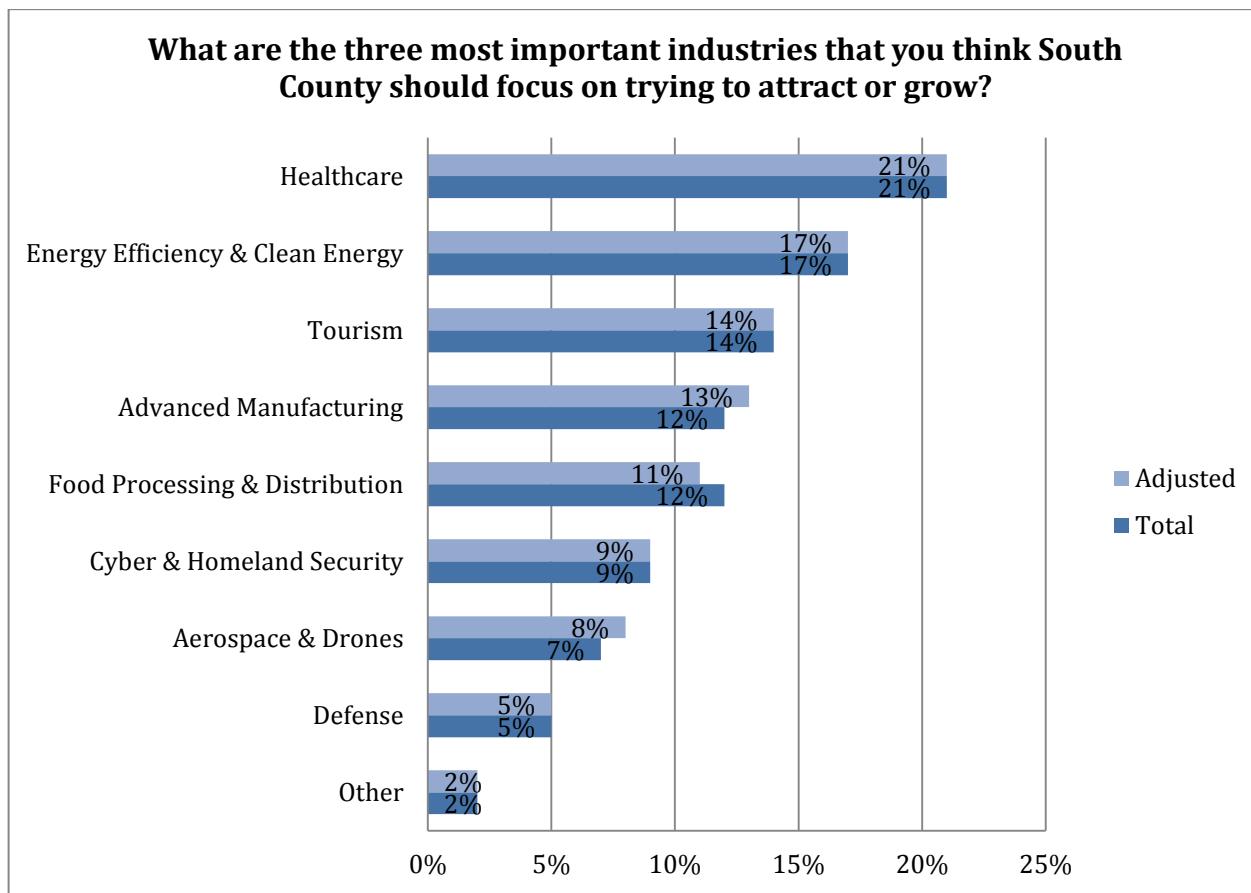
What Did the Survey Reveal?

As previously stated, the survey described investment strategies and specific actions aimed at building an economically prosperous South County, and asked respondents to state how important they viewed these strategies and actions.

Strategy 1: Invest in EMERGING INDUSTRIES

This strategy focuses on identifying the industries and businesses that have a good chance of growing in South County and creating high quality jobs for the community because of the workforce, the existing economic strengths, and the prime location.

The survey asked respondents to choose the three most important industries from a selection of eight specific industries and one catch-all bucket (in alphabetical order): Advanced Manufacturing, Aerospace & Drones, Cyber & Homeland Security, Defense, Energy Efficiency & Clean Energy, Food Processing & Distribution, Healthcare, Tourism, and Other.



*Percent selected one of the three most important



Overall, Healthcare and Energy Efficiency & Clean Energy emerged as the Top 2 industries, in that order, to pursue by survey respondents; tourism came in 3rd place, barely beating out Advanced Manufacturing and Food Processing & Distribution. The Top 3 remained the same when responses were adjusted to more closely represent the resident profile of South County.

There were a few variations when survey results were viewed from the perspective of a particular demographic group. Women place greater importance on healthcare than men (+4%). Whites rate Energy Efficiency and Clean Energy higher than Healthcare, 20% to 17% respectively. For 18-25 year olds, Food Processing /Distribution comes in 3rd (at 14%) instead of Tourism (11%). By small margins (of no more than 2%), Men, greater than 40 years old, and residents of San Ysidro rate Advance Manufacturing higher than Tourism. Blacks rate both Advanced Manufacturing (at 17%) and Food Processing/Distribution (16%) over Tourism (15%).

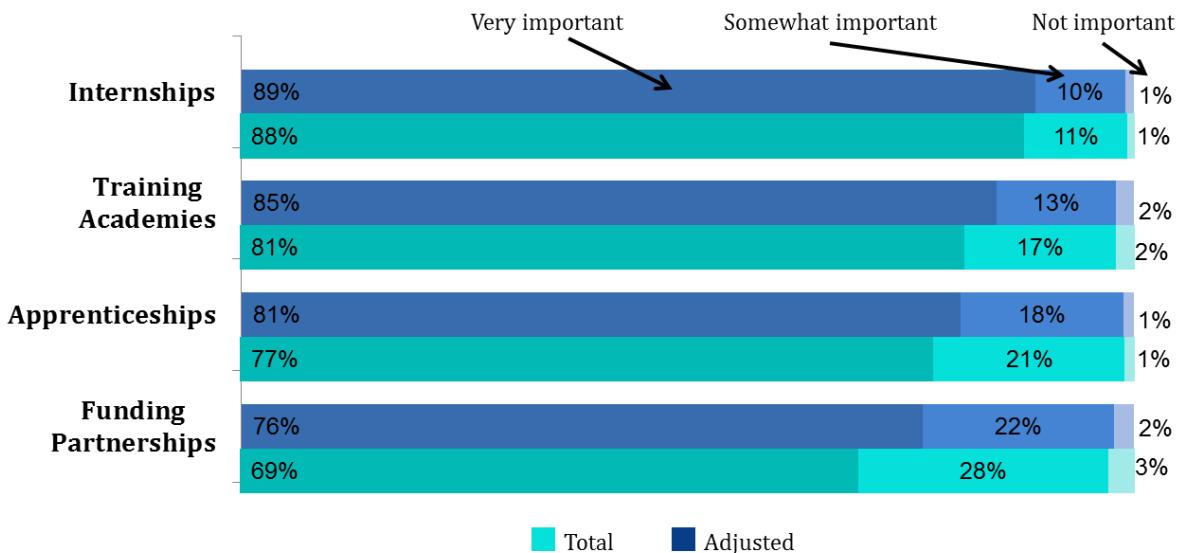
Strategy 2: Invest in PEOPLE

This strategy focuses on creating an educated and highly skilled workforce in order to attract businesses and industries that innovate, invent new products, and pay high wages.

The survey asked respondents to rate four types of programs – Apprenticeships, Internships, Funding Partnerships to match government dollars, and Training Academies – as *very important*, *somewhat important*, and *not important*.

Strategies to Invest in People	Total All Respondents			Adjusted To Represent South County		
	Very	Some what	Not	Very	Some what	Not
How important is it to do the following things to invest in people?	Create partnerships between businesses and schools to provide internships for students.	88%	11%	1%	89%	10%
	Create specialized training academies in high schools that provide skills needed by employers in growing industries.	81%	17%	2%	85%	13%
	Support apprenticeship programs in skilled trades.	77%	21%	1%	81%	18%
	Forge regional partnerships that match government dollars with business dollars to fund specialized training programs.	69%	28%	3%	76%	22%

Strategies to Invest in People



Among all survey respondents, the programs receiving the most *very important* ratings were, in order: Internships (at 88%), Training Academies (81%), Apprenticeships (77%) and Funding Partnerships (69%). Adjusted survey results showed that residents of South County maintained the same order; however, South County residents placed greater importance on all of the programs by selecting *very important* more often.

Results at the disaggregated level revealed some variety among the demographic groups. Coronado and Imperial Beach rack-and-stack differently: for Coronado, Training Academies (at 87%) are on top with Internships and Funding Partnerships tied for 2nd (at 79%); for Imperial Beach, Apprenticeships (at 83%) are a clear 2nd, with Training Academies and Funding Partnerships tied for 3rd (74% each). Relative to other ethnic cohorts, support for Internships and Training Academies is weakest among Whites (at 84%) and Blacks (85%). Support for Apprenticeships is strongest for residents of National City (89%) and San Ysidro (87%), and weakest in Bonita and Coronado (both at 70%). In general, the older the cohort, the greater the importance placed on all of the strategies. The highest any cohort rated any action as “Not Important” was 4%.

Strategy 3: Invest in NEIGHBORHOODS

This strategy focuses on building new communities that combine residential neighborhoods with other kinds of uses like shopping, offices, and public plazas -- all in compact and walkable districts. These walkable districts allow residents to live, work, and play without having to leave the

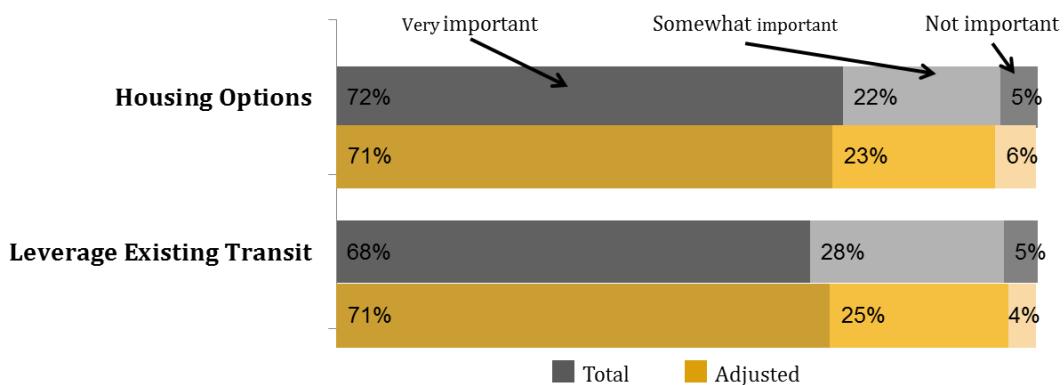


community, making South County an attractive and easy place to live.

The survey asked respondents to rate two approaches – increasing the range of housing options and concentrating development around existing public transit – for investing in neighborhoods as *very important*, *somewhat important*, and *not important*.

Strategies to Invest in Neighborhoods	Total All Respondents			Adjusted To Represent South County		
	Very	Some what	Not	Very	Some what	Not
	72%	22%	5%	71%	23%	6%
How important is it to do the following things to invest in new neighborhoods?	Build more housing for families of different income levels.					
	Guide construction of new neighborhoods into areas where public transportation already exists.	68%	28%	5%	71%	25%
						4%

Strategies to Invest in Neighborhoods



Just over 2/3^{rds} of all respondents rated both approaches as *very important*. When adjusted to represent the residents of South County, the ratings changed very little.

Differences arose when viewed from the lenses of particular demographic groups. Blacks and Women (at 75%) place greater importance on Housing Options than Men (66%). The older the cohort, the greater the importance on Leveraging Existing Transit. Whites (at 52%) are the least concerned with Housing Options, while Blacks (84%) are the most concerned. Geographically, Bonita residents gave the lowest percentage of Very Important ratings to both strategies, whereas San Ysidro and National City gave the highest percentage of Very Important ratings.



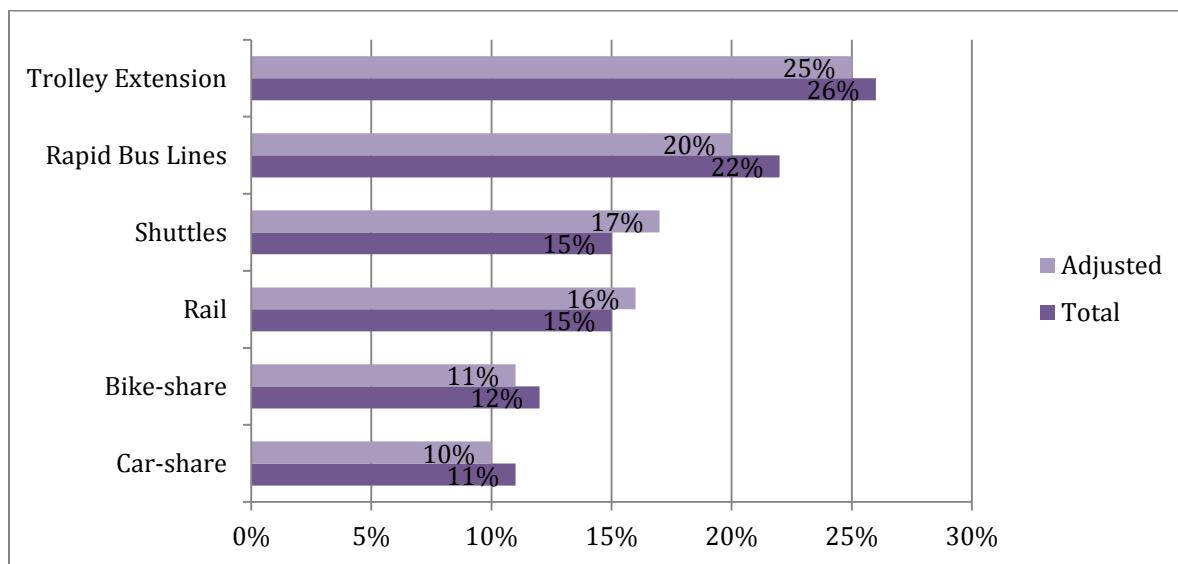
Strategy 4: Invest in MOVING PEOPLE AND GOODS

This strategy focuses on making it easier and more efficient for people and goods to move around and in and out of South County. A variety of investments are being planned to enhance access to parks, beaches, schools, jobs, civic centers, ports, airports, and border crossings.

The survey asked respondents to choose the three most important transportation options from a list of six (in alphabetical order): Bike-share, Car-share, an Eastern Extension to the Trolley, Light Rail & Commuter Rail, Rapid Bus Lines, and Short Hop Shuttles.

Strategies to Invest in Moving People and Goods		Total All Respondents	Adjusted To Represent South County
What are the three most important transportation options that South County should focus on to promote prosperity?	Trolley Extension to the East	26%	25%
	Rapid Bus Lines	22%	20%
	Short Hop Shuttles	15%	17%
	Light Rail & Commuter Rail	15%	16%
	Bike-share	12%	11%
	Car-share	11%	10%

*Percent selected one of the three most important



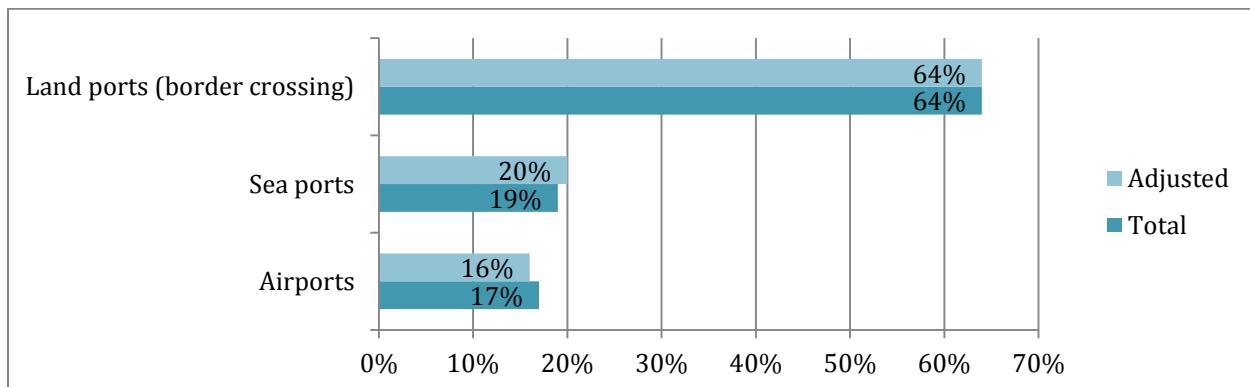
Similar to ranking the three most important industries to pursue, rankings for the three most important transportation options found clear choices for the Top 2 with a close battle for 3rd place. The Trolley Extension was the clear top choice for all respondents (at 26%) as well as when adjusted to represent South County residents (25%); Rapid Bus Lines was a solid 2nd at 22% and 20%, respectively. In a close race for the 3rd spot were Short Hop Shuttles and Rail (light & commuter).

A material variation at the disaggregated level was with Rapid Bus Lines. 18-25 year olds rate Rapid Bus Lines (at 26%) as slightly more important than the Trolley Extension (25%); for Blacks, the spread is even greater (28% to 23%). Residents of both Coronado and Imperial Beach rate Light Rail & Commuter Rail, instead of Short Hop Shuttles, as the 3rd most important transportation option.

The survey also asked respondents to prioritize in what order each type of port – air, land (border crossings), and sea – should be upgraded.

Invest in Moving People and Goods		Total All Respondents	Adjusted To Represent South County
What is the order of priority for upgrading ports?	Land ports (border crossing)	64%	64%
	Sea ports	19%	20%
	Airports	17%	16%

*Percent of 1st priority votes



Upgrades to border crossings were the top priority for almost 2/3^{rds} of both total respondents and the proxy for South County residents, with sea ports and airports essentially splitting the remainder. At the disaggregated level, Hispanics rate upgrades to land ports (at 73%) as much more important than upgrades to sea ports (18%) or airports (14%). In contrast, Asians & Pacific Islanders have a much more even distribution between land, sea, and air ports, at 45%, 27% and 30%, respectively. Upgrades to border crossings are most important to residents of San Ysidro (at 78%), and least important to residents of Bonita, National City, and Coronado (all in the 40s). Airport upgrades are rated as 2nd most important with Asians & Pacific Islanders, Blacks, and residents of Coronado.



Respondents were then polled on their frequency of US-Mexico border crossings.

	Total All Respondents	Adjusted To Represent South County
Approximately how often do you cross the US-Mexico border at either Otay Mesa or San Ysidro?	Never	35%
	Every few months	22%
	Once a month	13%
	Once a week	13%
	More than once a week	16%

At the aggregate level, over half of the respondents never cross the border, or do so infrequently (every few months); the rest of the respondents, for all intents and purposes, are evenly divided among the remaining frequencies of once a month, once a week, or more than once a week.

However, the aggregate results mask large variations when the survey results are disaggregated by race. Males cross the border more frequently than females. Differences in the frequencies of border crossings among the age groups are minimal. Non-Hispanics (with an average in the 60s for non-Hispanic cohorts) are over three times more likely to *never* cross the border than Hispanics (at 20%), with Asians & Pacific Islanders (at 69%) crossing the least. The geographic variations of Coronado and San Ysidro, where residents never crossed the border 71% and 18% respectively, suggests support for this disparity in frequency of border crossings by race.

Respondents were also polled on their tolerance for wait times when crossing the border.

	Total All Respondents	Adjusted To Represent South County
When you cross the border, how long are you willing to wait before you give up?	30 min	35%
	45 min	14%
	60 min	17%
	90 min	8%
	2 hours	10%
	longer than 2 hours	17%

Overall, approximately 1/3rd of respondents were willing to wait no more than 30 minutes to cross the border and another 1/3rd were willing to wait no more than either 45 or 60 minutes. Residents of South County had marginally higher wait time tolerances.

At the disaggregated level, males are willing to wait longer than females; same with 18-25 year olds relative to older cohorts. And the demographic groups with the highest wait time tolerances were Blacks and residents of National City and San Ysidro.



RANKING THE STRATEGIES

After rating aspects of each of the four investment strategies – in People, in Emerging Industries, in Neighborhoods, and in Moving People and Goods – respondents were asked to prioritize among the strategies themselves by choosing the Top 2.

Top Strategies for Investment	Total All Respondents		Adjusted To Represent South County	
	1 st Priority	2 nd Priority	1 st Priority	2 nd Priority
	44%	25%	41%	27%
Invest in people	44%	25%	41%	27%
Invest in emerging industries	30%	24%	35%	24%
Invest in neighborhoods	14%	28%	13%	26%
Invest in moving people and goods	12%	23%	12%	23%



In aggregate, the Top 2 strategies were: invest in People (at 44%) and invest in Emerging Industries (41%). Relative to all respondents, the proxy for South County residents chose the same Top 2 in the same order, but narrowed the gap between 1st and 2nd place from 14% (for all respondents) to 6% (for the proxy). In both cases, strategies to invest in Neighborhoods and invest in Moving People and Goods lagged significantly in priority.



The strategy of Investing in People was ranked highest among Blacks (at 59%) and 18-25 year olds (52%). The priority for Investing in Emerging Industries was highest among Whites (at 41%) and over-40 year olds (39%), and lowest among 18-25 year olds (23%) and Blacks (24%). While the priority order was clearly Investing in People followed by Investing in Emerging Industries at the aggregate levels, several demographic cohorts had a virtual tie between the two strategies, including over-40 year olds, Whites, and residents of Bonita and National City.



APPENDIX: Weighted Adjustment Methodology

The demographic characteristics of the sample collected differ from the makeup of South County's population. In order to control for some of these differences, ELP Advisors used a weighting process to adjust the results. The adjusted results provide a more representative estimate of the actual population's opinions and likely responses. The following describes the process used to make these adjustments.

When analyzing the survey responses, efforts were made to normalize the results based on three specific demographic characteristics. These include:

1. Age Band¹ –18-25, 25-30, 31-40, 41-50, 51-60, 60-70, or 70+
2. Race / Ethnicity² - African American, Asian, Hispanic/Latino, White, and Other
3. Gender: Male or Female

First, categories were created for every unique combination of the three demographic characteristics above. With 7 age categories, 5 race/ethnicity categories, and 2 gender categories, this yields 70 unique demographic groups ($7 * 5 * 2 = 70$). ELP Advisors then estimated the degree to which each demographic group was over-represented or under-represented in the survey in comparison to South County's actual population. Based on this, an adjustment factor was calculated for each demographic group to correct for this distortion. An appropriate adjustment factor was then applied to each survey response, based on the respondents' demographic group. These adjusted results therefore simulate a survey sample representative of the population in each of the three demographic criteria above.

Calculating the Adjustment Factor

To begin, ELP Advisors used census data to estimate the share of South County's population that falls into each combination of the three demographic characteristics above (70 unique demographic groups). The estimates were calculated by combining the distribution of each individual demographic characteristic in the population. For example, South County's population is 51% Female, 58% Hispanic, and 16% are between the ages of 18 and 25. Multiplying these shares ($.51 * .57 * .16 = .05$)

¹ Responses from respondents who declined to state their age or were under the age of 18 were not used in the weighted results.

² The survey allowed respondents to select more than one race/ethnicity category, while the demographic data on the South County population used had mutually exclusive answer categories. To correct for this in the weighting process, responses from respondents that selected multiple race/ethnicity categories were adjusted by a compound adjustment factor. The compound adjustment factor used was the product of the adjustment factor for each race/ethnicity choice selected along with that respondent's gender and age. So if a male over 70 years of age responded that they were White and Asian, their compound adjustment factor became the adjustment factor for White 70+ males multiplied by the adjustment factor for Asian 70+ males.



gives us an estimate that 5% of the population is Hispanic, female, *and* between 18 and 25 years of age.

Next, the share of eligible³ survey respondents that fit each demographic group was calculated. For example, 15% of survey respondents reported being Hispanic/Latino females between 18 and 25 years of age. To determine the degree of over or under representation for each demographic group, the percentage in each group in the sample was divided by the percentage estimated to be in that group among the overall population. Continuing our example, 15% divided by 5% equals 3, indicating that Hispanic or Latino females between 18 and 25 years of age were three times more prevalent in the sample versus the population of South County as a whole, and therefore *over-represented*. Next, ELP Advisors took the inverse of this result, giving an adjustment factor of 0.33 ($1/3 = 0.33$). The appropriate adjustment factor was then used to re-weight each response.

³ Respondents who did not report that they reside in South County, or reported being under 18 were excluded from the weighted findings.