

2025

NORTH COUNTY INDICATORS

A DATA-DRIVEN LOOK AT OUR
REGION'S ECONOMIC HEALTH



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ACKNOWLEDGEMENTS

San Diego North Economic Development Council would like to thank CSUSM for their continued support of the North County Economic Summit & the North County economy.

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Introduction

The North County Indicators (NCI) are detailed, key metrics that measure North County’s prosperity. The Council’s goal is to spark a more informed conversation about the region’s future and help our community better understand the evolving economic landscape.

This is the twelfth iteration of the NCI. The 2025 North County Indicators includes over 64 indicators and complimentary data sets.

This year, you can find sections on **“People”** (North County’s demographic data); **“Economy”** (details on the industries that drive our prosperity); **“Education”** (metrics around the region’s workforce and workforce development pipeline); and **“Place”** (measures focusing on quality of life and development).

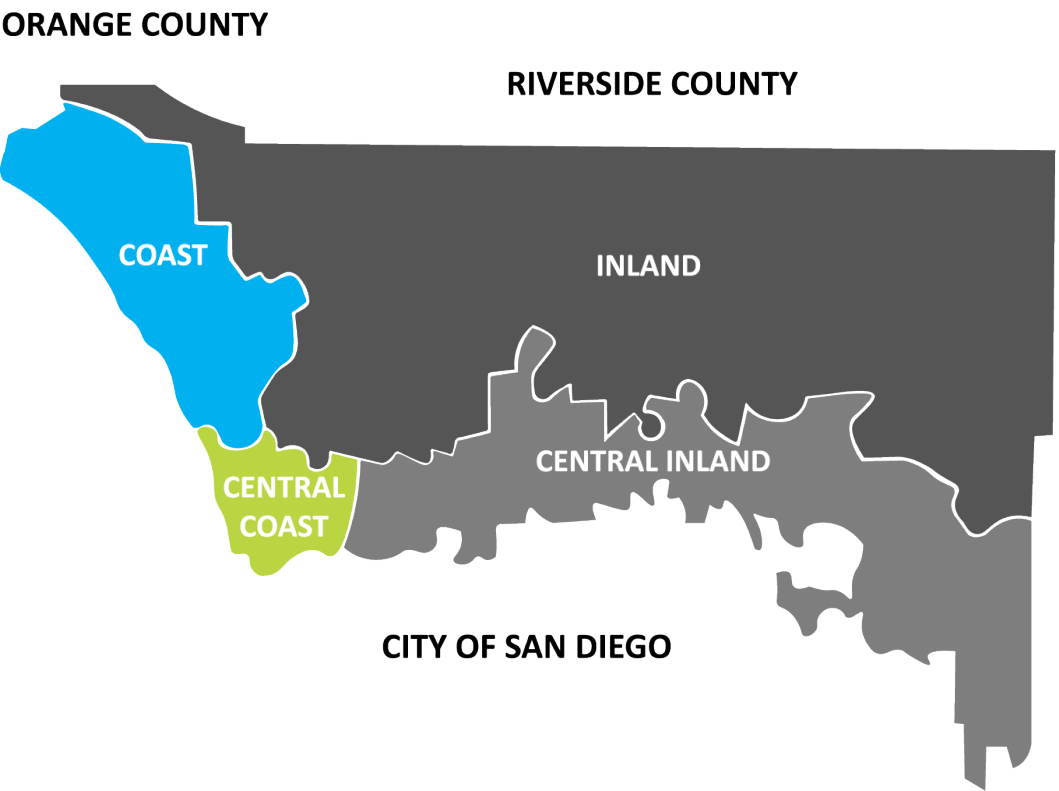
We also have included data about **North County’s industry clusters** and references for the key facts and figures about the **9 incorporated cities** in the region.

Help Us Refine the North County Indicators



Take our survey about the 2025 North County Economic Summit and NCI report to help us include the information you really need in future reports.

San Diego's North County Region



North County's Jurisdictions and Unincorporated Areas

COAST	CENTRAL COAST	INLAND	CENTRAL INLAND
Camp Pendleton Carlsbad Oceanside Vista	Cardiff by the Sea Del Mar Encinitas Rancho Santa Fe Solana Beach San Diego* (partial)	Bonsall Borrego Springs Escondido Fallbrook Palomar Mountain San Marcos Valley Center	Julian Poway Ramona San Diego* (partial)

* = Zip Codes 92197, 92129, 92128, 92130

PEOPLE



North County will undergo profound changes in the coming years. The median age will continue to rise, with a growing share of the population aged 65 and older. The percentage identifying as Latino will also increase, a trend already visible in the region's K-12 schools.

Table 1: Population Change, Regional Comparison (2020-2024)

	2020	2024
All San Diego County	3,298,634	3,291,101
North County Cities	759,747	758,632
California	39,538,223	39,128,162

Source: California Department of Finance

Table 2: Population in North County Incorporated Cities (2024)

Population in North County Incorporated Cities	2024 Population
Carlsbad	114,319
Del Mar	3,919
Encinitas	61,028
Escondido	150,002
Oceanside	171,483
Poway	49,273
San Marcos	95,998
Solana Beach	12,887
Vista	99,723
Total Incorporated Cities	758,632
Est. Unincorporated Areas	280,296
Est. City of San Diego North of SR 56	154,222
Total North County	1,193,150

Source: California Department of Finance

Table 3: Percent Change in Population (2020-2024)

Region	Change in Population	% Change in Population
All San Diego County	-7,533	-0.2%
North County	-1,115	-0.1%
California	-410,061	-1.0%

Source: California Department of Finance

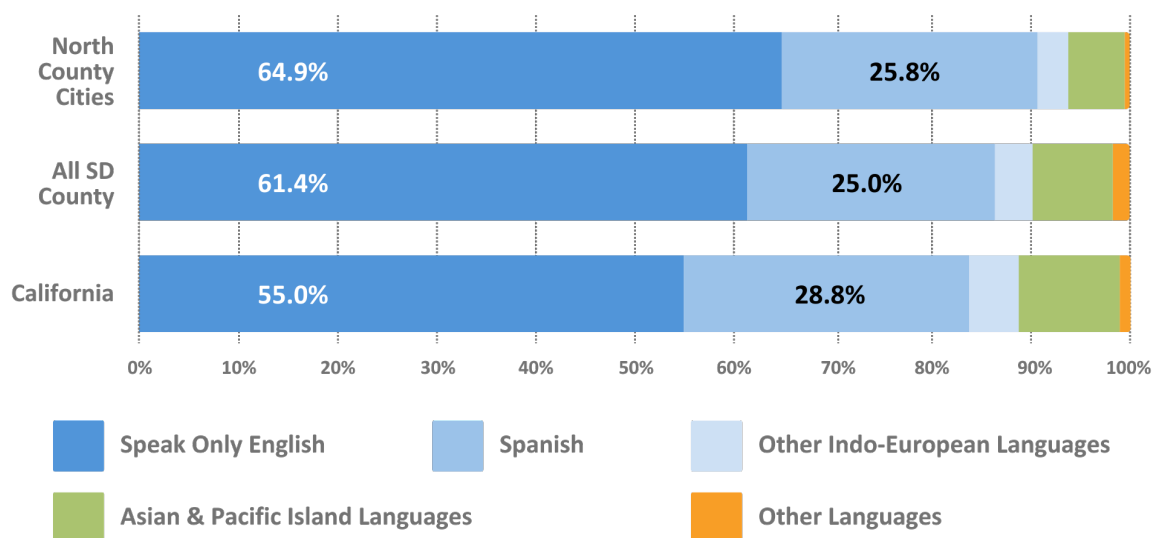
What the data tells us:

North County's population has been essentially flat since 2020. The combination of high housing prices and an aging population has dampened population gains. Demographic forecasts predict California, San Diego, and North County will essentially have flat population growth over the coming decades.

Why it matters:

Stagnate population growth presents particular challenges for **K-12 school districts** which were largely built to accommodate population growth. This also impacts **local government**, as much of its funding comes from sources like sales tax that are negatively impacted when population growth stalls. Slowing population growth is unlikely to have much impact on **housing prices**, given the deficit in supply that has built up over the past decade. Southern Riverside County is expected to continue its growth pattern as many commuters are pushed out of the county into Temecula Valley due to rising costs of living.

Figure 1: Primary Language Spoken at Home



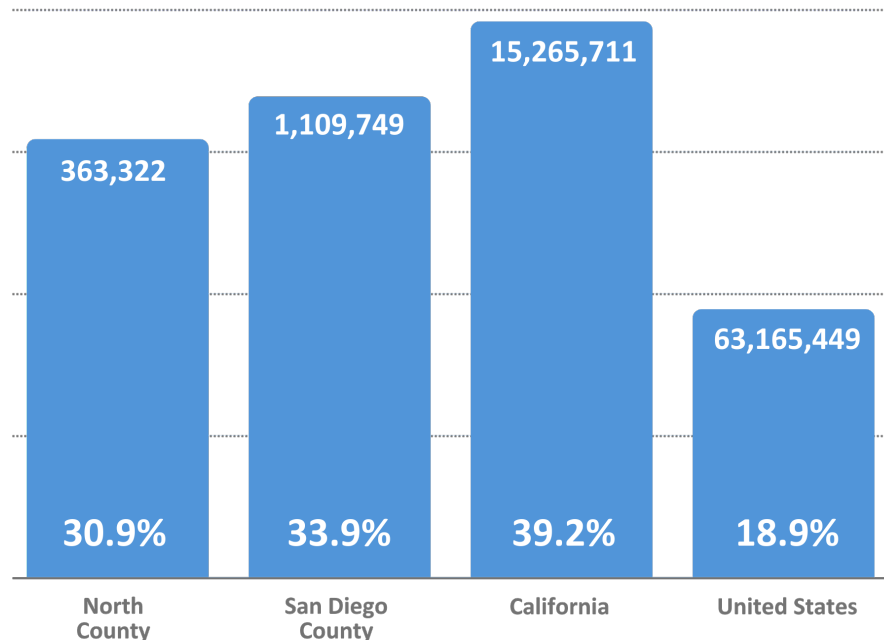
Source: U.S. Census Bureau; American Community Survey

Table 4: Population Aged 18-64 That Speaks English “Less Than Very Well”

Encinitas	Carlsbad	Oceanside	Escondido	San Marcos	Vista	Poway	California	U.S.
4.6%	5.3%	13.2%	18.8%	12.3%	14.8%	9.3%	17.8%	8.7%

Source: U.S. Census Bureau; American Community Survey

Figure 2: Population Identifying as Hispanic



Source: U.S. Census Bureau; American Community Survey

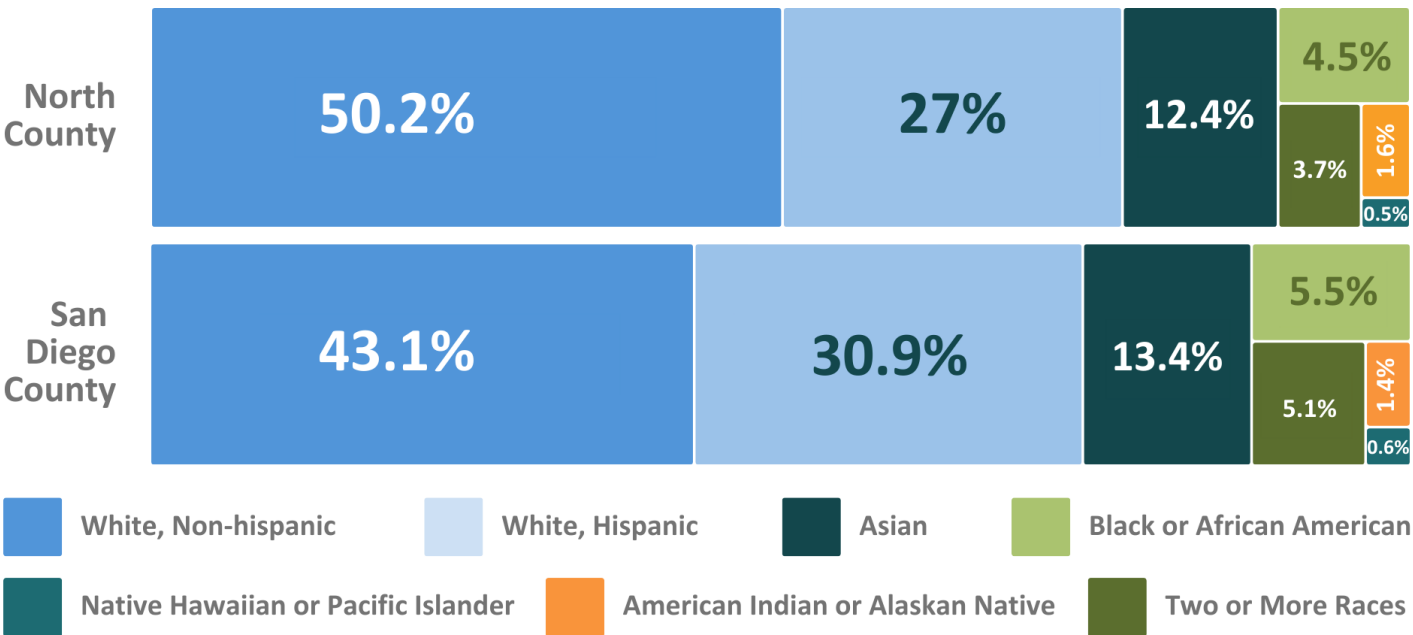
What the data tells us:

San Diego’s North County has a slightly lower percent of residents who identify as Hispanic compared to the rest of the county. However, over time this percentage is forecast to grow.

Why it matters:

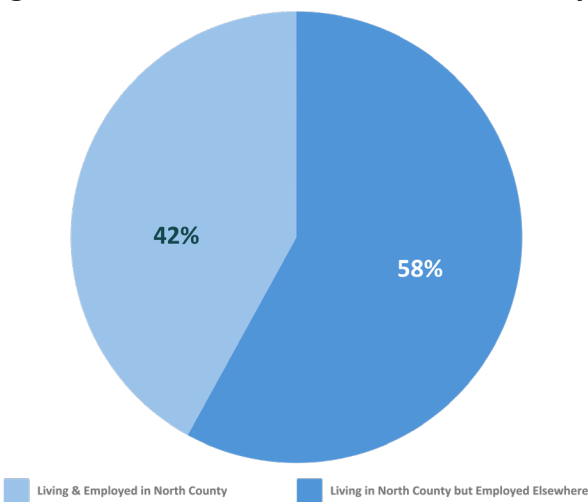
Ensuring that the region’s civic, cultural, educational, and business communities reflect and embrace this diversity is more critical than ever. Intentional steps toward greater inclusion, such as SDNEDC publishing a small business guide in multiple languages, are essential to this effort.

Figure 3: Racial Composition



Source: U.S. Census Bureau; American Community Survey

Figure 4: Resident Workforce in North County (2022)



Source: Census; LODES 2022

What the data tells us:

More North County residents work outside of North County than work within it, a trend that has been true for a number of years. The most striking issue for this report is that the number of individuals living in one North County city and working in another North County city (71,051) is significantly larger than those living and working in the same City (49,979).



For more information:

Use the QR code to view our recent report entitled: *“Worker Commuting Patterns in North County” (2025)*

Table 5: Residents Living & Working in North County by City (2022)

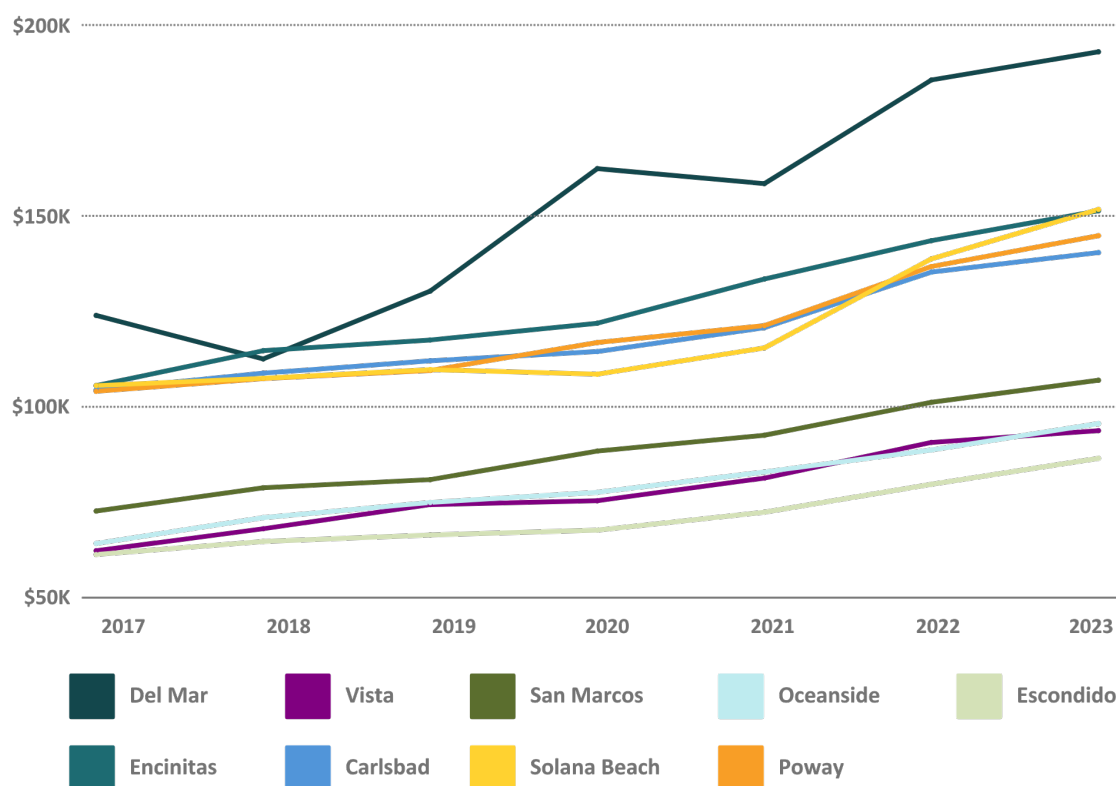
City	Living & Working in the Same City	Working in Another North County City	Working Outside of North County
Oceanside	12,209	23,090	33,103
Vista	5,194	16,137	19,999
Carlsbad	10,145	10,474	25,122
San Marcos	5,270	13,142	21,169
Escondido	11,042	15,232	37,522
Encinitas	3,682	5,815	14,733
Poway	2,437	2,393	16,864
Total	49,979	71,051	168,512

Source: Census; LODES 2022
 Note: Employment count may differ from other tables due to differences in LODES methodology

Table 6: Median Household Income by City (2017-2023)

City	2017	2018	2019	2020	2021	2022	2023	Growth (2017-23)
Del Mar	\$122,563	\$110,966	\$129,063	\$161,705	\$157,708	\$185,335	\$192,845	57%
Vista	\$59,833	\$65,696	\$72,125	\$73,163	\$79,196	\$88,715	\$91,854	54%
San Marcos	\$70,417	\$76,619	\$78,797	\$86,408	\$90,620	\$99,413	\$105,286	50%
Oceanside	\$61,778	\$68,652	\$72,697	\$75,411	\$80,837	\$86,701	\$93,724	52%
Escondido	\$58,834	\$62,319	\$64,038	\$65,326	\$70,115	\$77,554	\$84,477	44%
Encinitas	\$103,842	\$113,175	\$116,022	\$120,488	\$132,276	\$142,506	\$150,471	45%
Carlsbad	\$102,722	\$107,172	\$110,478	\$112,933	\$119,302	\$134,139	\$139,326	36%
Poway	\$102,338	\$105,732	\$107,902	\$115,332	\$119,847	\$135,605	\$143,825	41%
Solana Beach	\$103,864	\$105,821	\$108,118	\$106,904	\$113,903	\$137,647	\$150,820	45%

Source: U.S. Census Bureau; American Community Survey

Figure 6: Median Household Income Trend by City (2017-2023)

Source: U.S. Census Bureau; American Community Survey

What the data tells us:

North County median household incomes have generally grown faster than the county as a whole. Significant variations exist between more affluent coastal communities and incorporated cities in the inland valleys.

Why it matters:

The median household income in the most affluent North County city is more than double the income of the least affluent city. This creates challenges in creating equitable regional solutions.

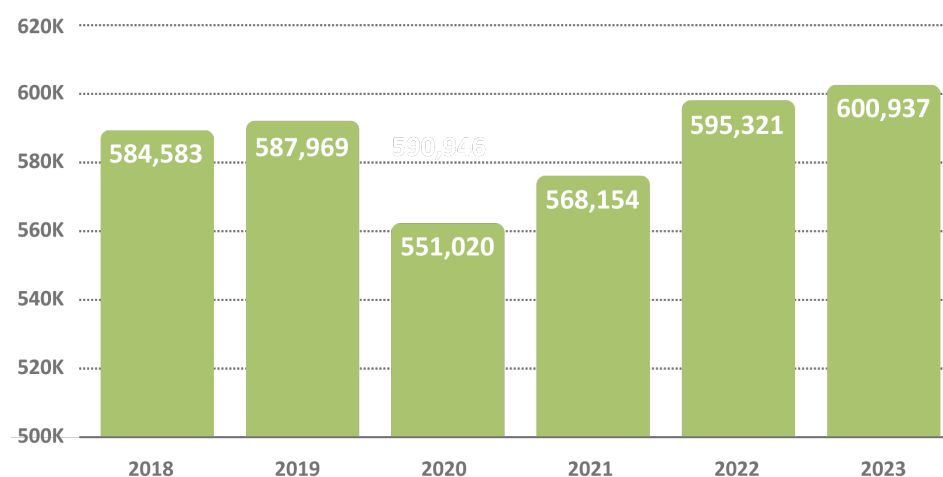
ECONOMY

North County has a strong, highly diversified economy. No single cluster dominates; instead, several sectors drive growth, including life sciences, technology, software, defense, advanced manufacturing, and tourism. A robust healthcare, education, and military presence further strengthens the region.

Since 2017, North County has added more than 17,000 jobs, bringing total employment to over 600,000. Unemployment remains low, though firms face ongoing difficulty recruiting and retaining key talent.

Federal policy will likely significantly impact the economy in 2025. Our life science cluster is sensitive to changes in drug pricing, insurance benefits, and federal research funding. North County's defense manufacturers may be affected by shifts in overall military spending and procurement priorities in San Diego. As discussed at the 12th Annual Summit, higher education remains a major driver of North County prosperity and is navigating significant changes and challenges.

Figure 6: Employment Growth in North County (2018-2023)



Source: EMSI

What is a Cluster Industry?

Economic clusters are a fundamental unit of analysis for economic development.

An “**economic cluster**” refers to companies in the same geographical area cooperating and sharing expertise. Executives at different firms within a cluster have often collaborated previously, emphasizing interaction over specific industry boundaries, and creating competitive advantages through relationships.

Table 7: Employment in North County by City (2018-2023)

City	Unemployment Rate (November 2023)	Unemployment Rate (December 2024)	Percent Change Year-Over-Year
Poway	3.5%	3.4%	-0.1%
Escondido	4.1%	4.2%	0.1%
San Marcos	4.2%	4.2%	0.0%
Vista	4.6%	4.7%	0.1%
Carlsbad	4.2%	4.0%	-0.2%
Oceanside	4.3%	4.3%	0.0%
Encinitas	3.5%	3.4%	-0.1%
Solana Beach	2.2%	2.3%	0.1%
Del Mar	0.0%	1.7%	1.7%

Source: EMSI

Table 8: Key Industry Cluster Contributions & Employment (2024)

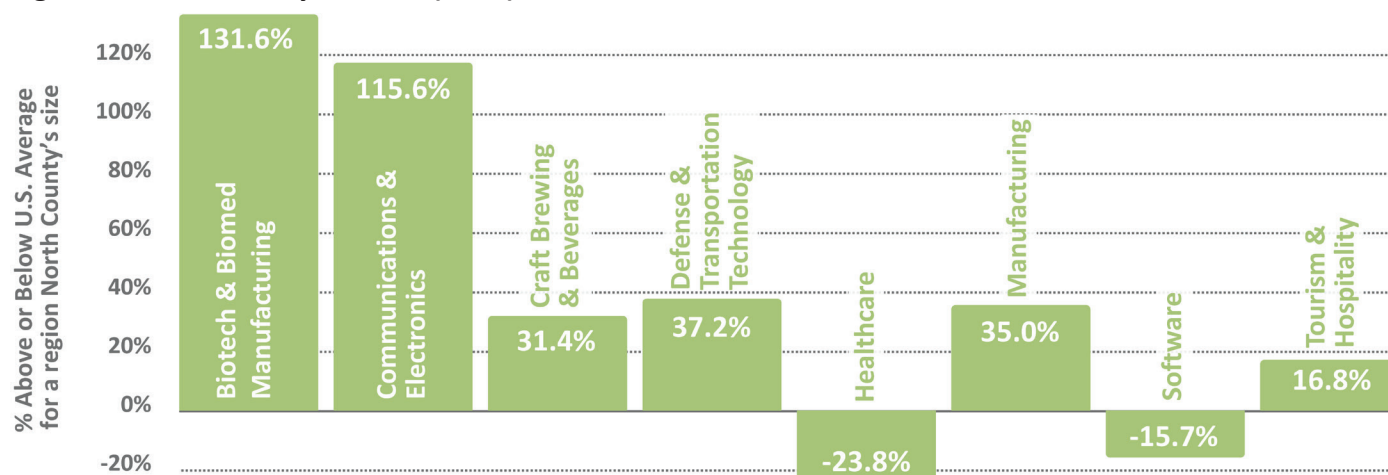
Cluster	Total Jobs 2023	Contribution to GRP (Billions)
Biotechnology and Biomed Manufacturing	17,758	\$7.00
Communication & Electronics	18,161	\$5.30
Craft Brewing & Beverages	4,847	\$801 Million
Defense & Transportation Technology	10,846	\$3.80
Healthcare Services	53,174	\$5.50
Manufacturing	56,433	\$15.30
Software	11,668	\$4.20
Tourism & Hospitality	68,554	\$5.80

Source: EMSI

Table 9: Percent Change in Key Industry Cluster Employment (2017-2023)

	Total Jobs in 2017	Total Jobs in 2023	Percentage Change
Biotechnology & Biomed Manufacturing	15,160	17,758	14.6%
Communication & Electronics	19,502	18,924	-3.1%
Craft Brewing & Beverages	4,141	4,847	14.6%
Defense & Transportation Technology	10,204	10,846	5.9%
Healthcare Services	45,898	53,174	13.7%
Manufacturing	52,613	56,433	6.8%
Software	11,152	11,668	4.4%
Tourism & Hospitality	65,817	68,554	4.0%

Source: EMSI

Figure 7: North County Clusters (2023)

Source: EMSI

What the data tells us:

Since 2017, Biotechnology and Healthcare Services have been the fastest growing sectors. Communications and Electronics, by contrast, have shed nearly 600 jobs. Craft Brewing, despite some decline from its 2021–2022 peaks, still shows overall growth since 2017.

Why it matters:

North County's economic diversity cushions the region against recession. Some sectors are more sensitive to economic cycles, while others are counter-cyclical or more resilient during downturns. However, this presents challenges for policymakers and stakeholders in formulating effective economic development strategies. One size decidedly does not fit all.

Table 10: Largest Occupations in North County (2024)

Occupation	2014 Jobs	2024 Jobs	2014-2024 Change	2014-2024 % Change	Median Annual Earnings	2024 Resident Workers	2024 Net Commuters
Fast Food and Counter Workers	11,455	12,216	761	7%	\$34,819	13,014	-798
Cashiers	11,952	11,301	-651	-5%	\$34,923	11,321	-20
Home Health & Personal Care Aides	3,773	11,010	7,237	192%	\$34,114	13,818	-2,808
Retail Salespersons	13,799	10,567	-3,232	-23%	\$35,443	10,716	-149
Office Clerks, General	6,686	8,897	2,210	33%	\$45,843	9,593	-696
General & Operations Managers	7,180	8,197	1,017	14%	\$160,335	9,001	-804
Laborers & Freight, Stock & Material Movers, Handlers	5,355	7,782	2,427	45%	\$38,002	8,869	-1,086
Stockers & Order Fillers	6,206	7,776	1,570	25%	\$38,085	7,973	-197
Janitors & Cleaners, Except Maids & Housekeeping Cleaners	6,389	7,455	1,066	17%	\$36,608	8,039	-584
Waiters & Waitresses	8,708	6,830	-1,877	-22%	\$33,966	7,272	-442
Software Developers	4,344	6,354	2,010	46%	\$152,589	8,075	-1,721

Table 11: Occupations with the Greatest Growth (2014-2024)

Occupation	2014 Jobs	2024 Jobs	2014-2024 Change	2014-2024 % Change	Median Annual Earnings	2024 Resident Workers	2024 Net Commuters
Home Health & Personal Care Aides	3,773	11,010	7,237	192%	\$34,114	13,818	-2,808
Cooks, Fast Food	2,793	5,270	2,477	89%	\$34,216	5,412	-142
Laborers & Freight, Stock & Material Movers, Handlers	5,355	7,782	2,427	45%	\$38,002	8,869	-1,086
Project Management Specialists	1,256	3,587	2,331	186%	\$107,141	4,146	-560
Office Clerks, General	6,686	8,897	2,210	33%	\$45,843	9,593	-696
Business Operations Specialists	3,120	5,323	2,203	71%	\$79,560	6,082	-759
Software Developers	4,344	6,354	2,010	46%	\$152,589	8,075	-1,721
Managers, All Other	1,078	3,024	1,946	181%	\$161,907	3,541	-517
Teaching Assistants, Except Postsecondary	3,920	5,734	1,814	46%	\$43,300	5,465	269
First-Line Supervisors of Food Preparation & Serving Workers	2,883	4,660	1,777	62%	\$42,973	4,657	3
Stockers & Order Fillers	6,206	7,776	1,570	25%	\$38,085	7,973	-197

Table 12: Occupations with the Greatest Decline (2014-2024)

Occupation	2014 Jobs	2024 Jobs	2014-2024 Change	2014-2024 % Change	Median Annual Earnings	2024 Resident Workers	2024 Net Commuters
Retail Salespersons	13,799	10,567	-3,232	-23%	\$35,443	10,716	-149
Waiters and Waitresses	8,708	6,830	-1,877	-22%	\$33,966	7,272	-442
Secretaries & Admin. Assistants, Except Legal, Medical & Executive	6,251	4,409	-1,842	-29%	\$49,130	5,071	-662
Farmworkers & Laborers, Crop, Nursery & Greenhouse	4,125	2,933	-1,192	-29%	\$33,702	2,725	209
Secondary School Teachers, Except Special & Career/Technical Education	3,707	2,596	-1,112	-30%	\$105,100	2,542	53
Counter & Rental Clerks	3,015	1,915	-1,100	-36%	\$39,166	2,203	-288
Substitute Teachers, Short-Term	3,449	2,467	-982	-28%	\$53,123	2,389	78
Electronics Engineers, Except Computer	1,861	889	-971	-52%	\$140,795	958	-69
Tellers	1,500	638	-862	-57%	\$43,971	765	-128
Bookkeeping, Accounting & Auditing Clerks	5,104	4,301	-803	-16%	\$51,376	4,982	-681

Source: EMSI

Dr. Michael Porter of Harvard University defines economic clusters through **two important characteristics**:

1. They involve firms cooperating and competing, often **leveraging social ties and relationships to create competitive advantage**. For Example, North County's Craft Brewing industry thrives on a tight-knit community. Brewers and leaders frequently collaborate, sharing intertwined work experiences throughout their careers.
2. Clusters typically **sell a substantial portion of their goods and services outside their region**, driving economic growth by bringing in new revenue.

The Latest Cluster Data at Your Fingertips!

SDNEDC provides updates every 6 months on 9 Key Industry Clusters.

Easily access GDP, employment, education, and more via this QR code. (Bookmark this page!)



Table 13: Occupations with the Greatest Number of Residents Commuting OUT of North County (2024)

Occupation	2014 Jobs	2024 Jobs	2014-2024 Change	2014-2024 % Change	Median Annual Earnings	2024 Resident Workers	2024 Net Commuters
Home Health & Personal Care Aides	3,773	11,010	7,237	192%	\$34,114	13,818	-2,808
Postsecondary Teachers	2,007	2,237	230	11%	\$109,065	4,321	-2,084
Registered Nurses	4,891	5,269	378	8%	\$132,746	7,224	-1,954
Software Developers	4,344	6,354	2,010	46%	\$152,589	8,075	-1,721
Accountants and Auditors	3,323	4,170	847	25%	\$89,128	5,415	-1,244
Security Guards	3,834	3,722	-113	-3%	\$37,918	4,945	-1,224
Lawyers	1,801	2,150	349	19%	\$165,277	3,327	-1,177
Laborers & Freight, Stock & Material Movers, Handlers	5,355	7,782	2,427	45%	\$38,002	8,869	-1,086
Management Analysts	2,191	2,934	744	34%	\$93,995	3,842	-908
Customer Service Representatives	5,884	5,102	-782	-13%	\$44,429	5,977	-875
General & Operations Managers	7,180	8,197	1,017	14%	\$160,335	9,001	-804

Table 14: Occupations with the Greatest Number of Workers Commuting INTO North County (2024)

Description	2014 Jobs	2024 Jobs	2014-2024 Change	2014-2024 % Change	Median Annual Earnings	2024 Resident Workers	2024 Net Commuters
Electricians	2,539	3,335	796	31%	\$72,675	2,679	656
Electric & Electromechanical Assemblers, Except Coil Winders, Tapers & Finishers	2,068	3,039	971	47%	\$42,869	2,396	643
Landscaping & Groundskeeping Workers	4,916	4,974	59	1%	\$39,166	4,427	547
Carpenters	2,673	3,934	1,261	47%	\$61,734	3,500	434
Farmers, Ranchers & Other Agricultural Managers	1,394	1,505	111	8%	\$41,653	1,091	413
Postal Service Mail Carriers	1,181	1,325	144	12%	\$57,491	966	359
Elementary School Teachers, Except Special Education	4,268	5,804	1,537	36%	\$94,320	5,487	318
First-Line Supervisors of Construction Trades & Extraction Workers	1,573	2,832	1,258	80%	\$88,941	2,540	291
Farmworkers, Farm, Ranch & Aquacultural Animals	1,085	1,023	-62	-6%	\$35,282	751	273
Teaching Assistants, Except Postsecondary	3,920	5,734	1,814	46%	\$43,300	5,465	269
Misc. Assemblers & Fabricators	4,456	4,595	138	3%	\$39,978	4,359	235
Amusement & Recreation Attendants	2,325	2,745	420	18%	\$34,882	2,519	226

Source: EMSI

EDUCATION

STEM education remains a critical engine of prosperity. This year's indicators highlight the number of STEM Bachelor and Associate degrees awarded by North County institutions and statistics on Math and English proficiency. While progress is evident, the data suggests that some districts still need additional support.

Table 15: Educational Attainment by City (2023)

Education	No High School Diploma*	High School Graduate	Some College, No Degree	Associate Degree	Bachelor Degree	Graduate or Professional Degree
Carlsbad	3.9%	9.1%	18.3%	7.2%	36.8%	24.6%
Del Mar	0.4%	6.1%	0.4%	0.7%	37.5%	47.2%
Encinitas	4.7%	8.3%	4.7%	6.6%	38.9%	28.1%
Escondido	19.6%	23.2%	19.6%	8.0%	18.3%	9.5%
Oceanside	13.5%	18.8%	13.5%	8.8%	22.1%	12.2%
Poway	6.2%	13.2%	6.2%	9.0%	31.4%	22.1%
San Marcos	11.9%	16.9%	11.9%	19.7%	28.4%	14.4%
Solana Beach	2.8%	9.0%	2.8%	11.4%	43.1%	28.8%
Vista	18.6%	22.1%	19.0%	23.4%	18.3%	8.9%
All of SD County	11.0%	17.9%	20.6%	8.3%	25.6%	16.5%

Table 16: CAASPP Math & English Proficiency (2023)**

District	Language Arts Proficient	Math Proficient
Bonsall Unified	52.7%	39.9%
Carlsbad Unified	71.6%	61.6%
Escondido Union High	54.8%	18.7%
Escondido Union Elementary	35.6%	27.4%
Oceanside Unified	39.7%	29.3%
Poway Unified	73.5%	65.5%
San Dieguito Union High	77.8%	67.0%
San Marcos	56.5%	46.2%
Vista Unified	42.7%	33.0%
Classical Academy	67.4%	54.8%
Escondido Charter High	75.8%	54.0%

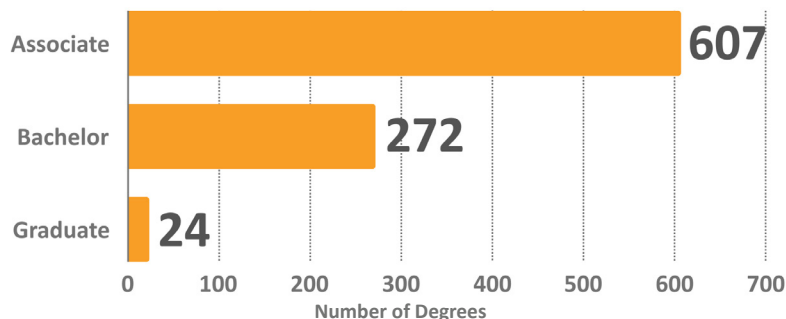
What the data tells us:

North County has a higher percentage of residents with Bachelor and Post-Graduate degrees than the rest of San Diego County or the nation. High educational achievement is a competitive strength that helps attract and retain high-skill, high-wage industries.

Why it matters:

Educational attainment does differ significantly among the North County cities, indicating the importance of close collaboration between municipalities, educational providers, and workforce development champions across the region.

Figure 8: STEM Degrees Awarded by North County Institutions (2023)



*Includes High School Equivalency

** California Assessment of Student Performance and Progress (CAASPP). Proficiency defined as meeting or exceeding state standards.

Sources: U.S. Census Bureau; American Community Survey; Ed-Data; EMSI

PLACE

One defining aspect of North County is how many people use Highway 78. Indicators in this section also highlight regional mobility, housing prices and availability, and shifts toward work-from-home and hybrid work.

Table 17: Regional Average Commute Times (2022)

Region	Mean Travel Time to Work (2022)
All of North County	27.5 minutes
SR 78 Cities	27.4 minutes
San Diego County	26.3 minutes

Sources: EMSI; U.S. Census Bureau; American Community Survey

What the data tells us:

The pandemic fundamentally altered commuting patterns, with remote and hybrid work becoming much more common. While “Return to Work” policies have received significant press attention, they are yet to show up in this data.

Table 18: Means of Transportation (2023)

City	Drove Alone	Carpooled	Took Public Transportation	Worked from Home	Other (Bike, Walk, Rideshare)
Carlsbad	62.3%	5.1%	0.8%	29.0%	2.8%
Encinitas	61.7%	5.5%	0.6%	28.7%	3.5%
Escondido	72.0%	9.8%	1.5%	12.8%	3.9%
Oceanside	71.4%	7.9%	2.1%	14.8%	3.8%
Poway	66.9%	8.1%	1.0%	20.2%	3.8%
San Marcos	69.8%	7.9%	0.5%	18.7%	3.1%
Vista	75.7%	7.4%	1.0%	13.2%	2.7%
All of San Diego County	67.6%	8.2%	2.2%	16.9%	5.1%

Sources: EMSI; U.S. Census Bureau; American Community Survey

Why it matters:

The surge in remote work affects commercial real estate, transportation systems, and economic development metrics. A North County resident working remotely for a company based outside the region boosts the local economy through their spending but may not be reflected in traditional employment data.

Table 19: Change in Remote Work by City (2017-2023)

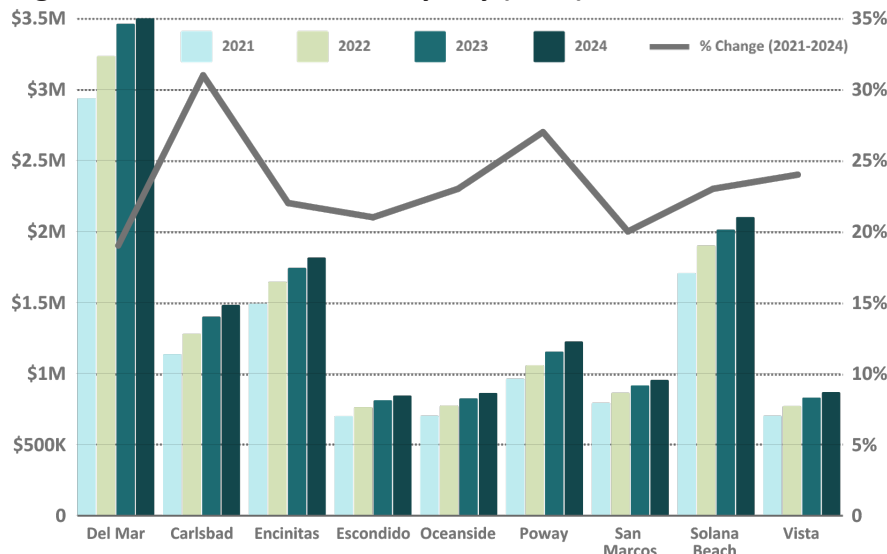
City	Residents Working Remotely (2017)	Residents Working Remotely (2023)	Change
Carlsbad	12%	29.0%	17.0%
Encinitas	15%	28.7%	13.7%
Escondido	4%	12.8%	8.8%
Oceanside	5%	14.8%	9.8%
Poway	7%	20.2%	13.2%
San Marcos	5%	18.7%	13.7%
Vista	4%	13.2%	9.2%
All of San Diego County	7%	16.9%	9.9%

Source: U.S. Census Bureau; American Community Survey

Table 20: Rental Home Statistics by City (2023)

City	Renter-Occupied Units	Rental Vacancy Rate	Households Spending Over 35% on Rent
Carlsbad	16,127	3.7%	49.3%
Del Mar	864	4.7%	32.8%
Encinitas	8,101	7.2%	42.1%
Escondido	24,208	3.3%	54.5%
Oceanside	25,510	4.4%	47.5%
Poway	3,991	3.7%	46.3%
San Marcos	11,411	4.6%	51.4%
Solana Beach	1,721	7.6%	48.2%
Vista	15,923	2.9%	45.8%

Source: U.S. Census Bureau; American Community Survey

Figure 9: Median Home Price by City (2024)

Source: Zillow, December 2024

Table 21: Jobs to Housing Balance (2014-2024)

City / Region	2014			2024			2014-2024		
	Payroll Jobs	Housing Units	Jobs to Housing Ratio	Payroll Jobs	Housing Units	Jobs to Housing Ratio	New Payroll Jobs	Housing Units Added	Net New Jobs to Net New Housing Ratio
Carlsbad	71,015	45,874	1.55	79,672	48,659	1.64	8,657	2,785	3.11
Encinitas	23,366	25,934	0.90	27,870	26,879	1.04	4,504	945	4.77
Escondido	54,738	48,603	1.13	63,097	50,844	1.24	8,359	2,241	3.73
Oceanside	54,586	65,428	0.83	63,757	68,300	0.93	9,171	2,872	3.19
Poway	21,600	16,816	1.28	26,881	17,494	1.54	5,281	678	7.79
San Marcos	38,310	29,812	1.29	42,650	32,972	1.29	4,340	3,160	1.37
Vista	40,782	31,149	1.31	47,181	34,065	1.39	6,399	2,916	2.19
7 Largest North County Cities	304,397	263,616	1.15	351,108	279,213	1.26	46,711	15,597	2.99
County of San Diego	1,332,960	1,180,471	1.13	1,534,047	1,266,919	1.21	201,087	86,448	2.33

Sources: California Dept. of Finance; E-5 Estimates; EMSI; QCEW U.S. Dept. of Labor

What the data tells us:

Measuring the ratio of net new jobs to new housing shows demand-supply relationships over time. North County, like much of the region, has struggled with this ratio, sometimes creating up to 4 new jobs for every 1 new home in the past two decades.

Why it matters:

A home is where a job goes to sleep at night. Unbuilt housing can lead to overcrowding in existing housing, living outside of the county with a “mega commute,” or even homelessness despite being employed. SDNEDC believes this to be one of the most critical issues facing the county and all of Southern California.



Reference Sheets for the 9 Incorporated North County Cities

Pages 14-18 are designed as referenceable sections for each of the nine incorporated cities in North County. Each page reflects key data points that are commonly asked when discussing economic development.

All data presented is the most up-to-date available as of Q1, 2025. Variations in sources are only present if requested by individual cities. Top industries for each city were determined using EMSI industry cluster data.



The Latest City Data at Your Fingertips

SDNEDC provides **biannual updates on the 9 Incorporated North County cities**, featuring the data points below, PLUS job growth, real estate stats, office vacancy rates, and more. **Bookmark our page** for easy access to the latest data.

sdnedc.org/city-dashboard-reports



VISTA

Top 4 Industries: Defense & Transportation Tech;
Communications & Information Tech; Military & Government;
Biomed & Biotech Manufacturing



CA Department
of Finance, E5
Estimates

99,723

2024 Population



CA Department
of Finance, E5
Estimates

34,065

2024 Housing Units



EMSI (2024)

47,181

2024 Employment



1-year ACS
(2024)

27.2%

Bachelor's Degree or Higher



5-year ACS
(2023)

\$91,854

Median Household Income



5-year ACS
(2024)

26.6 Minutes

Average Travel Time to Work

SAN MARCOS

Top 5 Industries: Education; Biomed & Biotech
Manufacturing; Manufacturing (Other); Healthcare;
Communications & Information Tech



CA Department
of Finance, E5
Estimates

95,998

2024 Population



CA Department
of Finance, E5
Estimates

32,972

2024 Housing Units



EMSI (2024)

42,650

2024 Employment



1-year ACS
(2024)

42.8%

Bachelor's Degree or Higher



5-year ACS
(2023)

\$105,286

Median Household Income



5-year ACS
(2024)

27.1 Minutes

Average Travel Time to Work

ESCONDIDO

Top 5 Industries: Household Goods & Services;
Healthcare; Real Estate, Construction & Development;
Education; Communications & Information Tech



CA Department
of Finance, E5
Estimates

150,002

2024 Population



CA Department
of Finance, E5
Estimates

50,844

2024 Housing Units



EMSI (2024)

63,097

2024 Employment



1-year ACS
(2024)

27.8%

Bachelor's Degree or Higher



5-year ACS
(2023)

\$84,477

Median Household Income



5-year ACS
(2024)

28.1 Minutes

Average Travel Time to Work

OCEANSIDE

Top 5 Industries: Military & Government; Tourism & Hospitality; Biotech & Biomed Manufacturing; Manufacturing (Other); Communications & Information Tech



CA Department of Finance, E5 Estimates

171,483

2024 Population



CA Department of Finance, E5 Estimates

68,300

2024 Housing Units



EMSI (2024)

63,757

2024 Employment



1-year ACS (2024)

34.3%

Bachelor's Degree or Higher



5-year ACS (2023)

\$93,724

Median Household Income



5-year ACS (2024)

29.5 Minutes

Average Travel Time to Work

CARLSBAD

Top 5 Industries: Biomed & Biotech Manufacturing; Manufacturing (Other); Education; Communications & Information Tech; Business & Admin Services



CA Department of Finance, E5 Estimates

114,319

2024 Population



CA Department of Finance, E5 Estimates

48,659

2024 Housing Units



EMSI (2024)

79,672

2024 Employment



1-year ACS (2024)

61.4%

Bachelor's Degree or Higher



5-year ACS (2023)

\$139,326

Median Household Income



5-year ACS (2024)

28.0 Minutes

Average Travel Time to Work

SOLANA BEACH

Top 5 Industries: Education; Research & Development; Communications & Information Tech; Business & Admin Services; Tourism & Hospitality



CA Department of Finance, E5 Estimates

12,887

2024 Population



CA Department of Finance, E5 Estimates

6,601

2022 Housing Units



EMSI (2024)

5,800

2024 Employment



1-year ACS (2024)

71.9%

Bachelor's Degree or Higher



5-year ACS (2023)

\$150,820

Median Household Income



5-year ACS (2024)

21.9 Minutes

Average Travel Time to Work

ENCINITAS

Top 5 Industries: Tourism & Hospitality; Household Goods & Services; Food & Beverage Processing & Distribution; Communications & Information Tech; Education



CA Department of Finance, E5 Estimates

61,028

2024 Population



CA Department of Finance, E5 Estimates

26,879

2024 Housing Units



EMSI (2024)

27,870

2024 Employment



1-year ACS (2024)

67%

Bachelor's Degree or Higher



5-year ACS (2023)

\$150,471

Median Household Income



5-year ACS (2024)

23.8 Minutes

Average Travel Time to Work

POWAY

Top 5 Industries: Defense & Transportation
Tech; Healthcare; Communications and Information Tech;
Biomed & Biotech Manufacturing; Manufacturing (Other)



CA Department
of Finance, E5
Estimates

49,273

2024 Population



CA Department
of Finance, E5
Estimates

17,494

2024 Housing Units



EMSI (2024)

26,881

2024 Employment



1-year ACS
(2024)

53.5%

Bachelor's Degree or Higher



5-year ACS
(2023)

\$143,825

Median Household Income



5-year ACS
(2024)

24.6 Minutes

Average Travel Time to Work

DELMAR

Top 5 Industries: Tourism & Hospitality; Communications
& Information Tech; Federal Government Services; Real Estate,
Construction & Development; Business & Admin Services



CA Department
of Finance, E5
Estimates

3,919

2024 Population



CA Department
of Finance, E5
Estimates

2,560

2022 Housing Units



EMSI (2024)

2,100

2024 Employment



1-year ACS
(2024)

84.7%

Bachelor's Degree or Higher



5-year ACS
(2023)

\$192,845

Median Household Income



5-year ACS
(2024)

22.4 Minutes

Average Travel Time to Work

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SDNEDC offers a number of research services. For Regional Stewards and Chairman's Circle Members, some research services are provided as a benefit of investment.



Economic Impact Reports

Investors at Chairman's Circle get one as part of membership. Otherwise \$5,000 to \$7,500 depending on number of public presentations and whether the report is laid out by SDNEDC's inhouse graphics team.

PRICING: \$5,000 TO \$7,000



Customized Economic Datasheets

Similar to our City "Dashboards" SDNEDC is able to compile at the census tract level information about demographic and economic data. Depending on number of datapoints this would range from \$2,000 to \$7500

PRICING: \$2,000 TO \$7,500



Real Time Labor Data

Reports the number of job postings, median advertised wages, skills and certifications required, and top employers recruiting for 400+ professions. Segmented by county, city, or groups of cities. Discounts for 15+ occupations.

PRICING: MEMBERS \$200, NON-MEMBERS \$500. PRICED PER OCCUPATION.



Geofencing Data

Work with SDNEDC on a customized report examining cell phone data and specific locations in North County to understand who is visiting your businesses, where they are coming from, and more. Free consultation.

PRICING: \$250/HOUR (2 HOUR MINIMUM. 20% DISCOUNT FOR SDNEDC INVESTORS.)



Marketing Lists

SDNEDC is able to pull on multiple sources to generate lists of companies in north county in various industry clusters.

PRICING: \$200/HOUR (2 HOUR MINIMUM)



Customized Research

SDNEDC staff offers 50+ years of economic development and marketing expertise. Our board taps into diverse resources and areas of expertise. Need more North County information beyond what is mentioned above? Contact Erik at ebruvold@sdnedc.org to discuss your research needs.

**SAN DIEGO NORTH EDC IS THE ONLY ENTITY SOLEY FOCUSED ON
JOB GROWTH NORTH OF SR 56. WE DO THIS BY:**

MARKETING

NORTH COUNTY
ADVANTAGES &
CONDUCTING RESEARCH
TO ATTRACT NEW &
INCREASED LOCAL
INVESTMENT

RETAINING

& EXPANDING
EMPLOYMENT BY
HELPING CURRENT
NORTH COUNTY
BUSINESSES SOLVE
SPECIFIC PROBLEMS

CONNECTING

EMPLOYERS &
EDUCATORS TO
STRENGTHEN
WORKFORCE PIPELINES
THROUGH REGIONAL
AWARENESS

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