



2022

**North County
Indicators**



SAN DIEGO NORTH
Economic Development Council

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Dear Valued North County Stakeholders,

This year marks an exciting time for San Diego North Economic Development Council (SDNEDC) and the North County region. Not only is SDNEDC and North County continuing to grow and attract new business, but robust recovery from the COVID-19 downturn is evident in the hardest hit industries including tourism, retail, and education.

Our annual North County Indicators (NCI) report measures these changes and reflects activity in North County's economy. This year SDNEDC brought production and oversight of the NCI report in-house. With a generous grant from the County Board of Supervisors, SDNEDC partnered with BW Research to create a new and improved version of this report.

The 2022 report reflects additional metrics highlighting the following:

- Understanding the clean energy landscape within North County
- Analyzing electric vehicle adoption and infrastructure building
- Exploring agriculture acreage and crop values
- Overview of public higher education indicators

We updated this report in hopes of creating a document one can reference throughout the year. This includes a quick fact sheet on each of the nine incorporated North County cities, allowing users to quickly look up population, employment base, and other commonly asked statistics. We also tried to organize the table of contents, list of figures, and data points themselves to make it easier for users to find what they need, when they need it.

SDNEDC is committed to being your first choice when it comes to data and research about North County. If you would like to inquire about research services, including economic impact reports, please reach out to San Diego North EDC's CEO, Erik Bruvold.

SDNEDC looks forward to another prosperous year in marketing the region for inward investment. We hope you enjoy this year's version of the NCI Report. If you'd like to provide feedback, please take this short survey: bit.ly/3k4tvjS.

Respectfully,

A handwritten signature in black ink, appearing to read "Amanda Boudreault".

Amanda Boudreault
Director of Research and Municipal Services

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Introduction

The North County Indicators (NCI) are designed to illustrate key measures of San Diego’s North County to spark a more informed conversation about the region’s future and serve as a reference to better understand the evolving economic landscape. This is the ninth iteration of the NCI. The 2022 North County Indicators includes over 64 indicators and complimentary data sets. The indicators are meant to provide a holistic measure of North County’s economic ecosystem.

This year’s North County Indicators provides several valuable resources for better understanding the region’s economic, past, present, and future.

- 1 The State of the North County, on pages 3-5, provides a summary of North County’s key indicators, and the highlights from this year’s findings in just a few pages.
- 2 Recover, Rebuild, and Reimagine: Opportunities and Challenges Facing North County’s Economy, on pages 7-11, examines the key issues facing the region and offers insight into how the region could respond.
- 3 2022 North County Indicators, on pages 13-53, are split into seven categories – People, Economy, Environment, Innovation, Education, Place, and Philanthropy. These seven categories provide quantitative measures of North County and allow regional stakeholders to delve deeply into a component of economic vitality.
- 4 Quick Facts: Pages 54–71, provide a profile for each of the nine incorporated cities that make up North County: Carlsbad, Encinitas, Escondido, Del Mar, Oceanside, San Marcos, Solana Beach, Poway, and Vista.



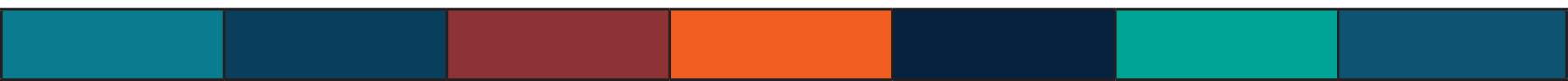
Acknowledgments

San Diego North Economic Development Council & BW Research would like to thank: Wells Fargo, CSUSM, Equus Workforce Solutions, and North City.

This report was made possible by a generous grant from the County of San Diego's Neighborhood Reinvestment Grant program.

This report was authored by W. Erik Bruvold, Amanda Boudreault, Josh Williams, Julian Ugalde, Ryan Young, and designed by Amanda Boudreault.

This report was managed and directed by Amanda Boudreault and W. Erik Bruvold.





State of North County

San Diego's North County stretches from its southern border at the 56 freeway and Carmel Valley, to the border of Orange County at Camp Pendleton's northern edge. In the east, North County goes as far as Borrego Springs and the desert that separates San Diego from Imperial County. The region includes nine incorporated cities, Carlsbad, Encinitas, Escondido, Del Mar, Oceanside, San Marcos, Solana Beach, Poway, and Vista, as well as unincorporated communities such as Bonsall, Fallbrook, Julian, Ramona, and Rancho Santa Fe.

In January of 2022, North County had just about **1.22 million** residents, just over **468,000 jobs**, and approximately **\$81 billion in gross regional product** for 2021. If North County was its own county in California, it would have the ninth largest population in the state, just below Sacramento and above Contra Costa counties. In terms of economic output, it would be the 11th most productive county in California, with considerably more economic output than Ventura or Fresno counties. If North County were its own state, it would be larger than eight states in the Union, by both population and employment.

Recovery in the Region

Unlike the slow, tepid economic recoveries that ensued after the Great Recession and the financial crisis of 2008, the economic recovery from the COVID-19 pandemic has been both faster and more robust, both nationally and in North County. In the 12 months from February 2021 to February 2022, the unemployment rate in San Diego County went from eight percent to four percent and added over 100,000 nonfarm jobs (just over 7% job growth). While North County only represents about a third of San Diego County's economy, more localized measures of unemployment show that North County cities like Carlsbad and Poway are well below the County average, and all the region's cities are showing considerable decline in unemployment over the February 2021 to February 2022 timeframe. As shown in the innovation section of this year's NCI Report, North County continues to see increased investment in innovation capital (see Figure 30) and phase 1 SBIR and STTR grant funding (see Figure 34), which is another valuable indication that businesses, workers, and investors are confident in the region's economic recovery.

The speed of the recovery has also generated its own challenges related to inflationary pressures and capacity constraints. These challenges associated with the speed of recovery will likely get worse before they get better and could potentially exacerbate the economic distress felt in those pockets of North County that were hit harder by the pandemic.

Economic Distress

An overall aggregated analysis of the North County economy largely reveals a healthy economic environment, that has recovered quickly from the pandemic and is poised for continued growth. Average household income in North County is above California and national averages, and educational attainment levels for adults are also above state and national average. North County has an average household income close to \$128,000 annually, higher than the \$112,000 in California and the \$92,000 national averages¹. Over 44% of adults 25 and over in North county have at least a bachelor's degree, compared to 35% in California and 33% nationally².

However, the aggregated averages for North County are hiding some sizeable pockets of economic distress that were hit hard by the pandemic and will likely face a different recovery path than those with more resources. A zip code analysis of North County indicates that there are several communities in North County that are facing multiple measures of economic distress. Whether that is a high poverty rate (>10%), a high percentage of residents without health insurance (>10%), a high percentage of adults 25 and over with a low level of education³ (>18%), a high unemployment rate (>6%), a low median annual household income (<\$65,000), and/or a high percentage of residents that are paying more than 35% of their total gross income on rent (>50%).

The following communities have at least 5,000 residents (16 years and older) in their zip code and demonstrate at least three measures of economic distress:

- 92025 (Escondido)
- 92027 (Escondido)
- 92054 (Oceanside)
- 92058 (Oceanside)
- 92083 (Vista)
- 92084 (Vista)

¹ ACS 5-Year Estimates Data Profiles

² ACS 5-Year Estimates Data Profiles

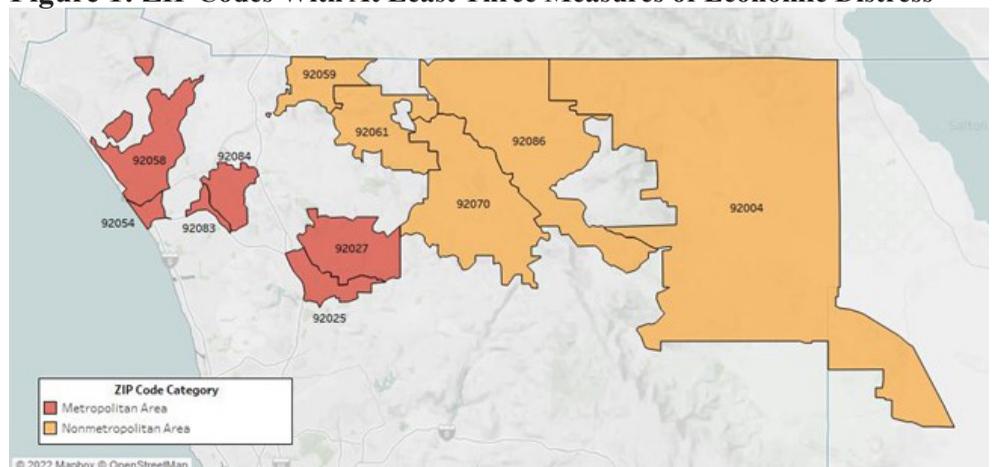
³ Defined as adults over 25 years with less than a High School Degree or Equivalency as their highest level of education.

Zip codes with less than 5,000 residents (16 years and older) that demonstrate at least three measures of economic distress, include:

- 92059 (Pala)
- 92061 (Pala)
- 92070 (Santa Ysabel)
- 92004 (Borrego Springs)
- 92086 (Warner Springs)

These communities represent those areas in North County that are struggling economically under multiple challenges and should be the focus of recovery and reinvestment efforts as we look to increase economic opportunity and vitality across the region.

Figure 1: ZIP Codes With At Least Three Measures of Economic Distress



BW Research; ACS 2016-2020 Data

The Great Reassessment Not Resignation

Last year's NCI (See NCI 2021: State of North County) identified the shrinking workforce as a potential challenge facing the region as the median age of North County residents continued to rise and a growing percentage of residents moved into the 55 and older age group and out of their primary working age (25 to 54 years old). This phenomenon has occurred all over the country, but has been felt acutely in North County, as employers struggle to find qualified job applicants particularly in industries like hospitality, healthcare, and retail. The popular narrative around this challenge has been often described as the "great resignation," suggesting that early retirements and an increased unwillingness to work by millennials and their younger counterparts were to blame. The reality is that although this may have been true at the height of the pandemic, it is largely not true today. Labor Force Participation Rates (LFPR) have largely recovered both nationally and within San Diego County, according to the BLS⁴. In March of 2022, the LFPR for 25-to-54-year-olds had reached 82.5%, almost a full percentage point higher than five years earlier (March 2017), well before any impacts of the pandemic were felt.

Just because people are willing to work again, does not mean that North County's employers are not feeling the effects of a tight labor market. The drivers of this tight labor market are fourfold, a long-term demographic trend of more seniors (65+) and less working age residents (25 to 54 years old), a tight housing supply which limits the ability to change that demographic composition, and a considerable reduction in immigrants who are often willing to work in some of those lower paying industries that are currently experiencing the biggest challenges finding willing workers.

Fourthly, the other part of this equation that seems to have changed, while working aged people are working and looking for work, is that at least some level changed **where** they are willing to work **or what** they are willing to work for. A recent survey BW Research completed in another Southern California County, provides clues of the evolving attitudes towards work. In this survey, about three in five adult respondents⁵ agreed with the statement that "I am no longer willing to work in a job that I don't see a good future in" and agreement was even higher among workers under the age of 40. There is also national data showing that more workers are changing jobs and moving into different industries and/or positions. This all leads to an environment where workers are more willing to leave a job if they do not think it is in their best interest and there is diminished supply of potential workers, particularly for those positions that pay less and/or do not provide a perceived quality career pathway.

⁴ Source: <https://fred.stlouisfed.org/series/LNS11300060>

⁵ Taken from Santa Barbara County LFPR research, BW Research 2022. The proportion is derived from those that answered the question.



Recover, Rebuild, Reimagine: North County's Emerging Economic Vitality

As North County comes out of the pandemic, doldrums, change, challenges, and opportunities face the region's businesses, workers, and residents. The following themes are meant to provide a catalyst to conversations about how North County should think about supporting economic vitality in the region.

1

Learning & Adapting in a Volatile Landscape

In March of 2022, San Diego County's unemployment rate was 3.4%⁶, with even lower unemployment rates among residents in several North County Cities such as Carlsbad (3.1%), Del Mar (1.1%), Encinitas (2.6%), Escondido (3.1%), Poway (2.2%), San Marcos (3.1%), and Solana Beach (1.3%). The tight labor market and the lack of talent to drive economic recovery and resilience in North County, as described in the previous pages, is a challenge that North County will need to wrestle with, both in the near-term and in the long-term. Having enough workers is not only important for current businesses that need to grow, they are also critical to the innovation ecosystem and entrepreneurs who are looking to create new businesses in the region.

The challenge is how do we make sure that we have enough workers in North County to meet the needs of current businesses that are growing and recovering, as well as the opportunities from innovation and entrepreneurship. While growing the overall population in North County and/or increasing immigration of primary working age individuals may solve the problem, they are not viable solutions at this time for several reasons. Instead, the region needs to increase or at least stabilize current labor force participation rates among current North County residents, increase labor fluidity among residents, and attract primary working-aged individuals and their families.

⁶ Source: <https://www.labormarketinfo.edd.ca.gov/data/unemployment-and-labor-force.html>

Potential Strategies for North County to Expand the Workforce & Improve Talent in the Region:

1. Increase educational attainment among North County’s least educated cohorts: Just over one in four adults (25 and older) in North County has a high school diploma or less as their highest level of education. While we have discussed the importance of age in labor force participation, the second most important determinant of workforce participation is educational attainment. The table below shows the considerable difference in labor force participation rates of adults (25 years and older) with less than a high school diploma as their highest level of education (46%) compared to those with a 4-year college degree or more (72%), more than 50 percent higher among the higher educated cohort.

Strategies to increase educational attainment among North County residents’ less educated cohorts should increase the region’s LFPR. Specific programs to increase educational attainment could combine specific vocational training with foundational academic degrees that increase labor fluidity. These combination education and vocational programs could be in construction, healthcare, or culinary occupations that offer both immediate employment opportunities and sustainable career pathways, and could include support for those where English is a second language.

Table 1: National LFPR by Educational Attainment (November 2021)

LFPR for Adults 25 & Older (Highest Educational Level)	
4-year College Degree or More	72%
Some college or an Associate Degree	63%
High School Diploma or Equivalency	56%
Less than a High School Diploma	46%

US Census, ACS 2016-2020

2. Identify & communicate the best opportunities for career pathways & lattices with less than a 4-year degree: One interesting challenge of the pandemic and the attempted return to normal, is that it seemed to increase applications for California universities, particularly UC’s⁷ and CSU’s while also experiencing a decline in enrollment at California’s community colleges⁸.

⁷ Source: <https://www.latimes.com/california/story/2021-01-29/uc-record-college-admission-applications-show-wide-diversity>

⁸ Source: <https://calmatters.org/education/higher-education/2022/03/community-college-enrollment/>

Building upon the SOCAL (Student Opportunities for Career Awareness and Learning) foundation, SDNEDC would work with North County's community college programs, such as Mira Costa and Palomar. This will communicate to potential students the specific career pathways that emphasize education combined with industry employment opportunities in the region, so that students can work, at least part time, in an industry related to the specific courses they are taking. The tight labor market means there needs to be more options for students to work and attend school at the same time, while working towards a career pathway that will lead to high enough wages to live successfully in the region.

3. Identify and implement strategies to increase housing opportunities for younger, primary working age individuals and families: Ultimately you cannot have a conversation about expanding North County's workforce without increasing workforce housing, particularly around the region's transit and work centers. These strategies could be around altering proposition 13, so older, retired residents would have stronger incentives to move out of larger single-family homes, and/ or it could include more flexibility around developing new, denser housing around transit and work centers in North County.

2 Reassessing Manufacturing & the Global Supply Chain

Between the pandemic, the war in Ukraine, and some of the current and potential challenges associated with trade from Asia, supply chain challenges are not going away and businesses are being forced to reexamine their own supply chain. This global challenge and considerable headache for large, established OEM's (Original Equipment Manufacturer) also presents an opportunity for current and potential North County businesses that can support the key industry clusters in the region, including those in Defense, Aerospace & Transportation Manufacturing, Life Sciences, Information & Communication Technologies (ICT), Craft Beer, Wine & Spirits, and Active Sports & Lifestyle.

Potential Solution(s) to Consider

1. Research and catalog the current and potential supply chain contributors in North County by key industry cluster. North County businesses are twice as likely to classify themselves in manufacturing (10%) than the rest of San Diego County (5%). The region has over 3,000 jobs in each of the following specialized fields that could support at least one of the region's key industry clusters:

- a. Navigational, measuring, electromedical and control instrument manufacturing
- b. Aerospace products & parts manufacturing
- c. Pharmaceutical and medicine manufacturing
- d. Communications equipment manufacturing
- e. Medical equipment and supplies manufacturing

These specialized manufacturers along with the professional and business service firms that support them, all form a valuable ecosystem that has the potential to grow if it can be identified, mapped and connected to potential partners across the country, as firms reexamine their supply chain.

2. Connect North County businesses to the Southern California mega-region (Greater Tijuana to Los Angeles) and beyond. This second consideration builds off the cataloging and mapping of the different industry cluster supply chains and ecosystems that were identified and developed in the previous recommendation. After these industry cluster ecosystems have been mapped, this information needs to be communicated with regional entities and industry stakeholders across the Southern California mega-region, from greater Tijuana up to greater Los Angeles. This is a starting point to connect North County’s vibrant industry cluster participants with potential partners that offer more certainty, quality control, and opportunities for collaboration and innovation.

3 Infrastructure, Industry Clusters, & Economic Resilience in North County Describe

The growing challenges associated with aging infrastructure, emerging technologies, and climate change all point to a considerable increase in infrastructure investment both from federal and state sources as well as private sector contributions. These opportunities are ones that North County should be both planning and advocating for as the region, state and country look to improve both its resilience and long-term vitality.

Potential Solution(s) to Consider

1. Engage in regional planning and research to understand the economic and employment opportunities for North County as it transitions from the status quo to a low- or no-carbon economy: National, statewide, and regional institutions are planning a transition from the status quo to a low- or no-carbon future. Many of the technologies associated with transitioning to a low-carbon economy, including offshore wind, hydrogen, energy storage, advanced biofuels, and electrical grid investments all have the potential for sizeable increases in employment and economic impact in a relatively short period of time. A 2021 economic forecast by BW Research for the state of New York showed employment in the nascent offshore wind industry growing from around 500 workers in 2019, to over 14,000 workers in 2030. Over the same period employment in energy storage went from less than 2,500 workers to over 6,500.

This type of dynamic employment growth will increase jobs in construction, professional services, manufacturing and across the logistics supply chain.

Additional economic opportunity is likely to be created for those businesses and the regions where they are found. They can be early entrants into these emerging industries as they will have the opportunity to supply the rest of the country and the world in this transition to a low-carbon economy.

2. Identify and catalog the firms in North County that could contribute to infrastructure investments in transportation, healthcare, broadband and water: The transition from the status quo to a low- or no-carbon economy is only one of the critical infrastructure investments that North County and California need to be considering and planning for. The following areas of infrastructure investment should include an identification and description of key partners and contractors that could play a role in the following infrastructure investments:

a. Transportation – Whether you are evaluating the increase in electric vehicles and charging stations, the potential for hydrogen fuel, the need to improve ports, or just the requirements to maintain and repair roads and bridges, investments in our transportation system will need to be considerable and diverse.

b. Healthcare – The challenges brought on by the COVID-19 pandemic showed the need for both high technology healthcare solutions and infrastructure to develop vaccines and new therapeutics, as well as the more traditional need for expanded capacity for treating and caring for sick individuals. Our aging population and the potential for another pandemic speak to the need for increased investment in our healthcare resources.

c. Broadband – The need for increased access to safe, secure broadband is only growing as more students find it necessary for school, and more people work remotely from home. A safe and secure broadband plays a burgeoning role in healthcare, security, and transportation. The infrastructure investments in broadband will play a central role in determining who has access to the emerging economy and who does not.

d. Water – The challenges of living in Southern California and providing safe, clean water to all its residents are not going away. Whether you are looking at desalination, water storage, or water purification, the investments associated with ensuring reliable and clean water to North County and Southern California are considerable challenges we need to continue to build upon.

San Diego's North County Region



North County Cities

- Carlsbad
- Del Mar
- Encinitas
- Escondido
- Oceanside
- Poway
- San Marcos
- Solana Beach
- Vista
- San Diego* (partial)

North County Unincorporated Areas

- Bonsall
- Borrego Springs
- Camp Pendleton
- Cardiff by the Sea
- Fallbrook
- Julian
- Palomar Mountain
- Ramona
- Rancho Santa Fe
- Valley Center

* = Zip Codes 92197, 92129, 92128, 92130



People

The indicators in this section help one understand the population in North County and the role that people play in driving the region's comparative advantage. Please note that most demographic data is through 2020, due to the availability of population statistics from the American Community Survey.

A Changing Population

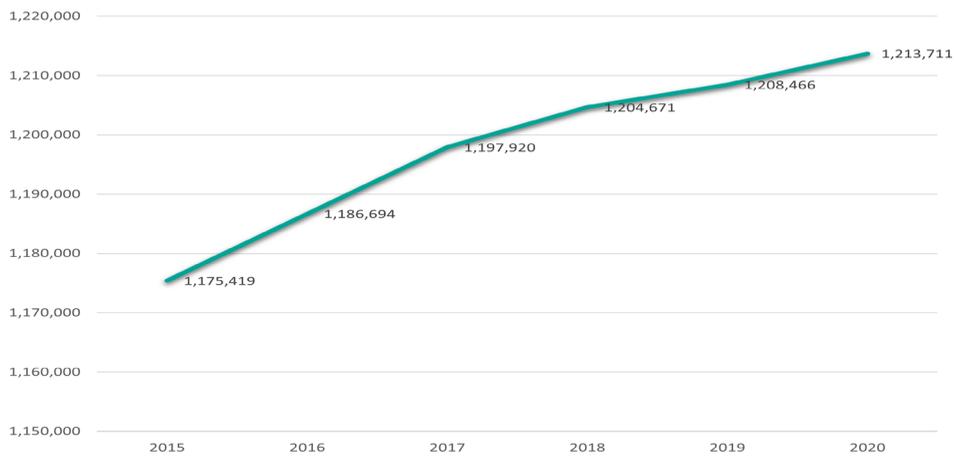
San Diego's North County's population reached 1.2 million in 2018 and kept growing through 2019 and 2020. This represents over one-third (36%) of San Diego County's total population and is just over 3% of California's residents. North County's population is larger than that of Westchester County in New York, Montgomery County in Maryland, and Contra Costa County in California.

The population in North County has been growing steadily since 2016, increasing by approximately 27,017 people between 2016 and 2020. This rate of growth is similar to that seen in the broader San Diego County, and slightly faster than the statewide average. This population growth rate since 2016 is considerably greater than that in neighboring Orange County (2%) and Los Angeles County (0%), but lower than the national average of almost 5%.

North County's population continues to grow considerably older, with the 65-to-74 age group growing 26% since 2015. The trend will continue, as those aged between 45 and 64 make up about 26% of North County's population.

While 21% of North County's population is foreign-born, this proportion is lower than the percentage of foreign-born individuals in San Diego County, California, and other counties in the state. The percentage of individuals who speak other languages and speak English less than very well is also lower in North County compared to San Diego County, the state, and other surrounding counties.

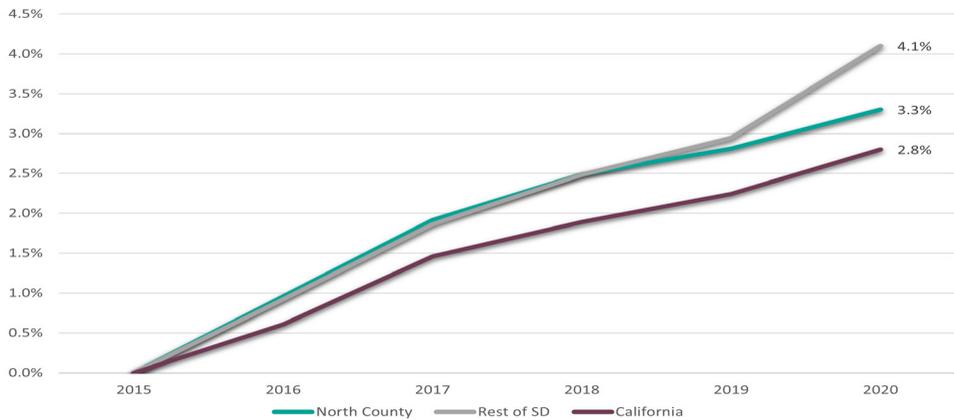
Figure 2: North County's Population Growth (2015-2020)



Between 2015 and 2020, the resident population in North County increased by approximately 38,000 people.

US Census, ACS 5-Year Estimates, 2020

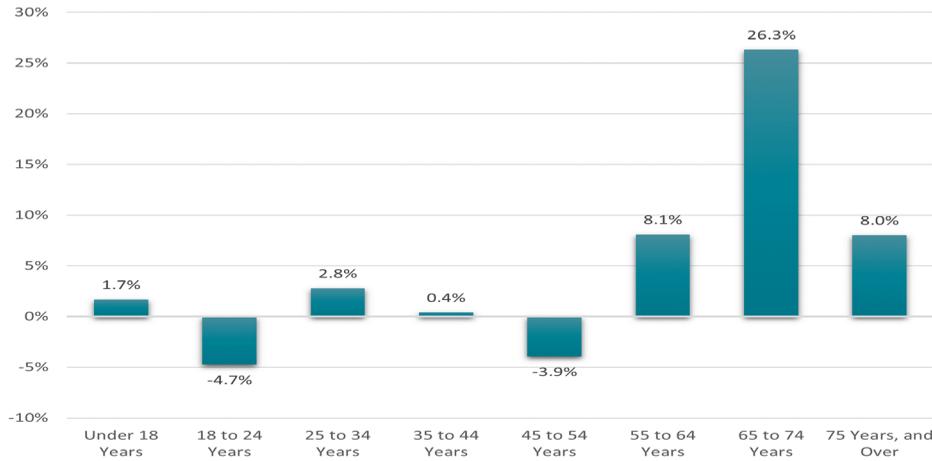
Figure 3: North County Population Comparisons



Between 2015 and 2019, the population in North County grew at a faster rate than in California, and at nearly the same rate as in the rest of San Diego County.

US Census, ACS 5-Year Estimates, 2020

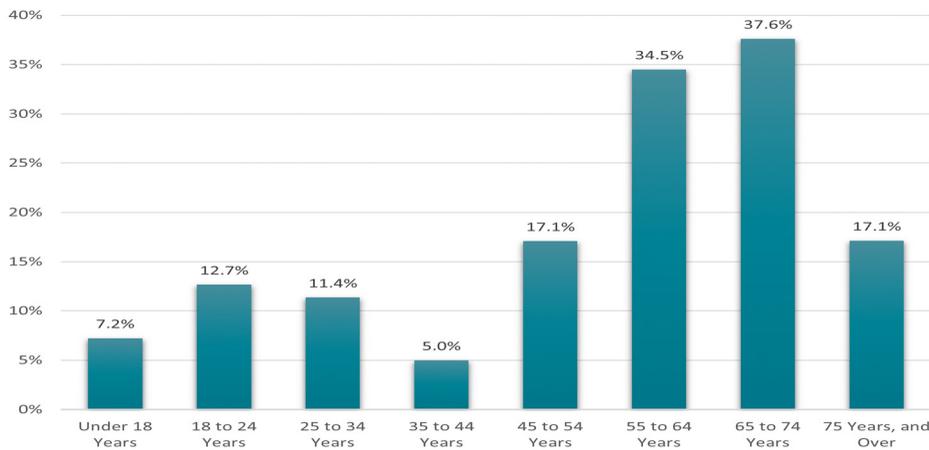
Figure 4: Change in North County’s Overall Population by Age (2015-2020)



US Census, ACS 5-Year Estimates, 2020

From 2015 to 2020, residents aged 55 years and older drove the population growth in North County.

Figure 5: North County Changing Hispanic and Latino Population by Age (2015-2020)



US Census, ACS 5-Year Estimates, 2020

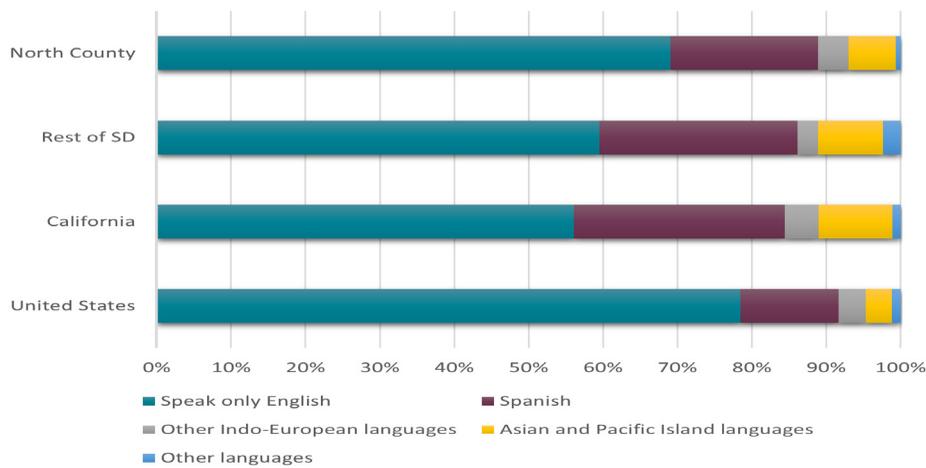
Within the Hispanic or Latino population, the demographic aged between 55 and 74 accounted for the largest increase.

Table 2: Foreign Born Population Comparisons (2020)

United States	North County	Rest of San Diego County	San Diego County	California	Orange County	Los Angeles County	Santa Clara County
13.5%	21.2%	23.9%	22.9%	26.6%	29.6%	33.7%	39.7%

US Census, ACS 5-Year Estimates, 2020

Figure 6: Language Spoken at Home, 5 Years and Older (2020)



Compared to the rest of San Diego County and California, North County has a higher percentage of people who speak only English, though the proportion is lower than national the national average.

US Census, ACS 5-Year Estimates, 2020

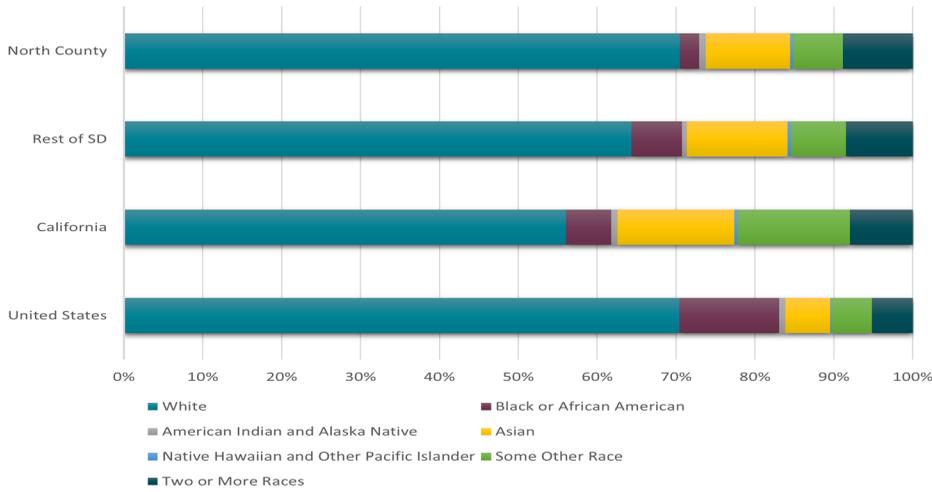
Table 3: Speak English Less Than Very Well, 5 Years and Older (2020)

United States	North County	Rest of San Diego County	San Diego County	California	Orange County	Los Angeles County	Santa Clara County
8.2%	10.9%	14.7%	13.3%	17.4%	18.6%	23.2%	20.1%

US Census, ACS 5-Year Estimates, 2020

Overall, North County has a smaller percentage of people who speak English less than “very well” compared to other counties in California and the state average.

Figure 7: Race Comparison (2020)



The percentage of White individuals in North County is almost equal to the national average. North County has a higher proportion of White individuals compared to the rest of San Diego and California.

US Census, ACS 5-Year Estimates, 2020

Figure 8: North County’s Hispanic Population (2020)



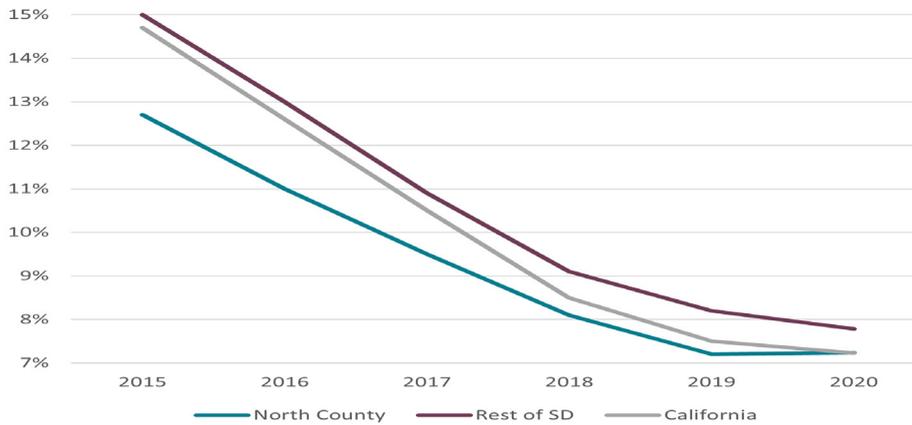
North County has a lower Hispanic or Latino population compared to the rest of San Diego and other California counties except Santa Clara County.

US Census, ACS 5-Year Estimates, 2020

Healthcare

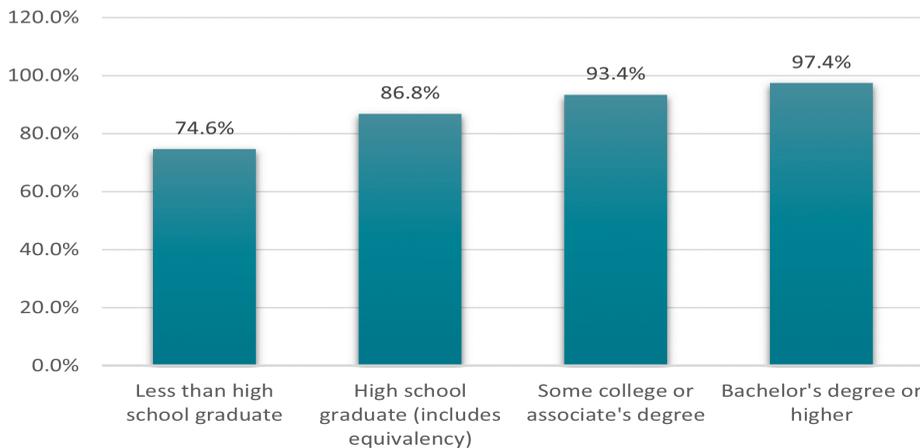
Fewer than one in thirteen (7%) North County residents do not have access to insured healthcare. North County’s population with healthcare insurance is slightly above the averages for San Diego County and the United States.

Figure 9: Uninsured Rates in North County



US Census, ACS 5-Year Estimates, 2020

Figure 10: North County Uninsured Rate by Educational Attainment (Civilian Pop Over 25)



US Census, ACS 5-Year Estimates, 2020

WHY DO THESE INDICATORS MATTER?

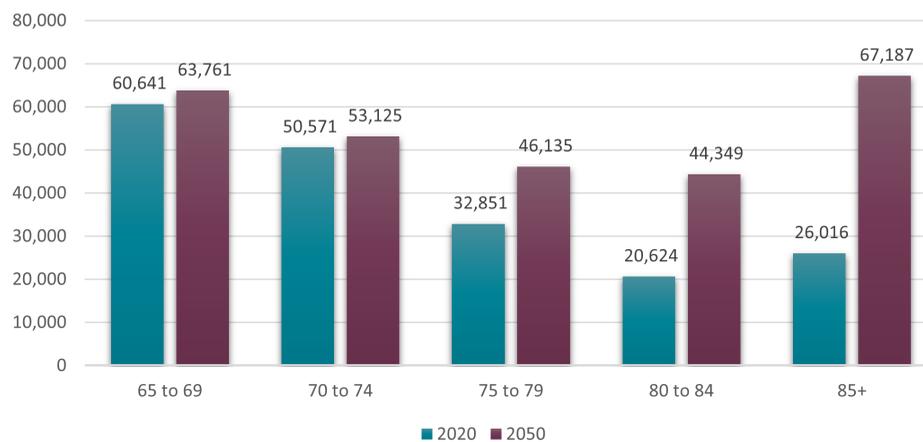
Access to insured healthcare remains a challenge for many households across the U.S. Tracking healthcare coverage is important because a lack of coverage may substantially strain the household budgets and savings and decreases the region’s overall economic resilience. Additionally, high rates of uninsured patients could negatively impact healthcare providers in North County, lowering their capacity to make the investments in infrastructure, new technologies, and expanding facilities and staff to aid the aging population.

Table 4: Healthcare Uninsured Rate Comparison

United States	North County	Rest of San Diego County	San Diego County	California	Orange County	Los Angeles County	Santa Clara County
8.7%	7.2%	7.8%	7.6%	7.2%	7.1%	9.2%	4.2%

US Census, ACS 5-Year Estimates, 2020

Figure 11: 65+ Age Cohort in North County (2020 vs. 2050)

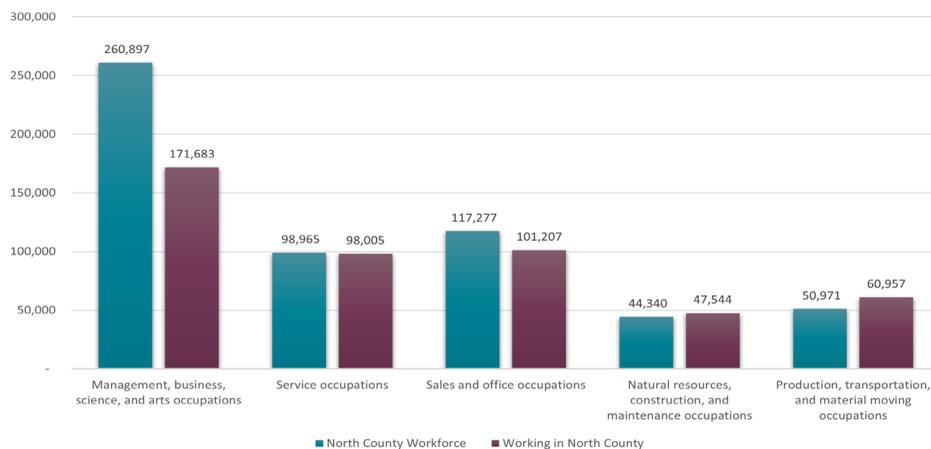


SANDAG Series 14 Forecast

Workforce & Income

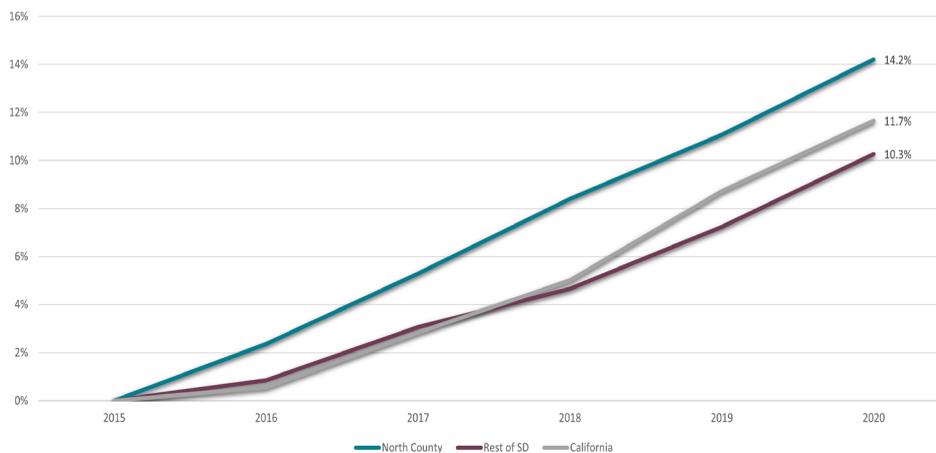
There are nearly 93,000 workers who leave North County to go to work. Over 90% of these workers are in higher-paying management, business, science, and art occupations.

Figure 12: Resident vs Commuter Worker Comparison



JobsEQ, 2021

Figure 13: Growth in Household Income (2015-2020)



US Census, ACS 5-Year Estimates, 2020

WHY DO THESE INDICATORS MATTER?

Because North County is surrounded by other hubs of employment (including the City of San Diego and Orange County), it is important to consider the net flow of workers in and out of North County and the types of occupations workers leaving and entering North County hold. This metric is particularly important for North County as it continues to transition towards being an independent and dynamic economy.

Please note that the data for this chart is likely to be impacted by the pandemic and its effects on remote work policies as many workers may be working from home, while still showing that they are employed outside the region.

Table 5: Median Household Income by Region

United States	North County	Rest of San Diego County	San Diego County	California	Orange County	Los Angeles County	Santa Clara County
\$64,994	\$99,119	\$79,125	\$82,426	\$78,672	\$94,441	\$71,358	\$130,890

US Census, ACS 5-Year Estimates, 2020

North County has higher median household incomes than the rest of the county, state, and nation.

Workforce of Tomorrow

Childcare is often a major factor in determining the labor force status of parents. Fewer childcare options combined with higher costs can lead to parents leaving the workforce. The COVID-19 pandemic presented childcare-related challenges with the closure of schools and childcare programs, and the sudden rise in remote work. Ensuring a solid childcare industry is essential for working parents to stay in the workforce, have affordable childcare, and for children to receive the necessary quality of childcare for development. (Please note that indicators for this section are at the county level due to data availability).

Table 6: Childcare Resources

	% Spaces Available for Children	Total Licensed Facilities	Child Care Centers	Family Child Care Homes
California	24.5%	35,748	10,520	25,228
San Diego	30.0%	4,124	928	3,196

California Child Care Resource and Referral Network, California Child Care Portfolio (Apr. 2020); U.S. Census Bureau, American Community Survey public use microdata (Oct. 2020). As cited on kidsdata.org

San Diego County has more space availability for children than the California average, and annual costs of childcare are slightly under the average for the state.

Table 7: Annual Cost of Childcare (2018)

	Infant- Child Care Center	Infant- Family Child Care Home	Preschooler-Child Care Center	Preschooler-Family Child Care Home
California	\$17,384	\$11,718	\$12,168	\$10,975
San Diego	\$16,760	\$10,389	\$11,762	\$9,828

California Child Care Resource and Referral Network, California Child Care Portfolio (Apr. 2020); U.S. Census Bureau, American Community Survey public use microdata (Oct. 2020). As cited on kidsdata.org

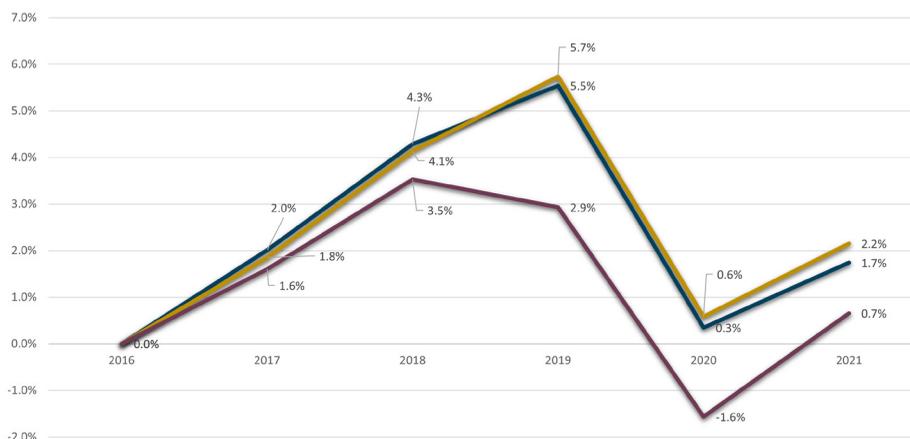


Economy

Overall Employment

2021 was a year of recovery from the COVID-19 pandemic. Between 2016 and 2019, employment in North County increased by 5.5%. However the pandemic wiped out most of those gains. The pattern is very similar to the rest of San Diego County. In 2020, employment gains represented 1.7% growth relative to 2016, while the rest of San Diego County had 2.2% and California had 0.7%.

Figure 14: Employment Growth in North County



JobsEQ 2016-2021, Q2

WHY DO THESE INDICATORS MATTER?

The number of jobs, as well as the change in number over time, is often the first metric used to evaluate any given economy. Analyzing the growth in employment and changes in unemployment provide immediate insights into the state of the economy. Consistent job growth, and particularly growth comparative to that seen in surrounding regions, signals that an economy is still growing and expanding.

Table 8: Employment and Employment Growth

	2021 Employment	Growth (2020-2021)	Unemployment (2021)
North County	478,404	1.4%	3.7%
Rest of San Diego County	1,027,470	1.6%	4.4%
San Diego County	1,505,900	1.5%	4.2%
Orange County	1,662,886	2.5%	3.7%
Los Angeles County	4,582,526	1.8%	6.2%
Santa Clara County	1,128,796	2.4%	2.9%
California	18,138,058	2.3%	6.5%

JobsEQ, 2020-2021, California EDD, 2021

Industry Cluster and Job Quality

Industry clusters have become the fundamental basis for understanding and evaluating regional economies. Industry clusters are closely affiliated industries that often work together in supply chains or through other relationships to create value that exceeds their individual parts. This grouping of industries allows for a quick identification of the keystone economic drivers in a region.

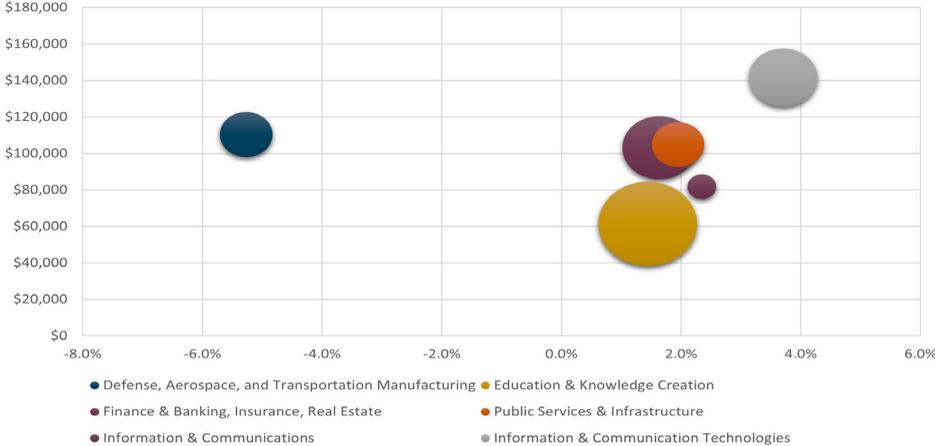
Clusters with relatively high concentrations of employment in North County, such as Defense, Aerospace, & Transportation Manufacturing, and Biotechnology & Biomedical Devices, have far-reaching effects on the region's economy and workforce.

Additionally, job quality provides a deeper understanding of what types of employment opportunities exist in North County, and the livelihoods that they offer. The impact of COVID-19 on employment was not felt evenly by North County workers, as higher paid (tier 1) workers saw little to no decline in employment opportunities, while their lower paid counterparts (tier 3) saw a much larger decline in employment. In 2021, employment returned to the pre-pandemic growth rate, with tier 1 and tier 2 employment still demonstrating growth relative to 2016, while tier 3 employment remained below 2016 levels.

In the following charts, industry clusters were organized into two groups. Industry clusters that saw slow growth (<5%) or decline from 2020 (Q2) through 2021 (Q2), and those that demonstrated rapid growth (>5%) over the same period. It is important to note that the change in employment seen in these clusters is also reflective of the effects that the COVID-19 pandemic had during 2020. Clusters that showed abnormal growth during the pandemic are more likely to show slower growth or even a decline in 2021, and clusters that were heavily affected by the pandemic show higher than usual growth as they recovered in 2021.

As shown in the Figure 15, the first group of industry clusters are made up of those whose growth was below five percent. Education, Information & Communications, Public Services, Information & Communications Technologies, and Finance & Banking, Insurance, Real Estate demonstrated growth between 1% and 4% in employment. Defense, Aerospace, and Transportation Manufacturing was the only cluster to decline in employment.

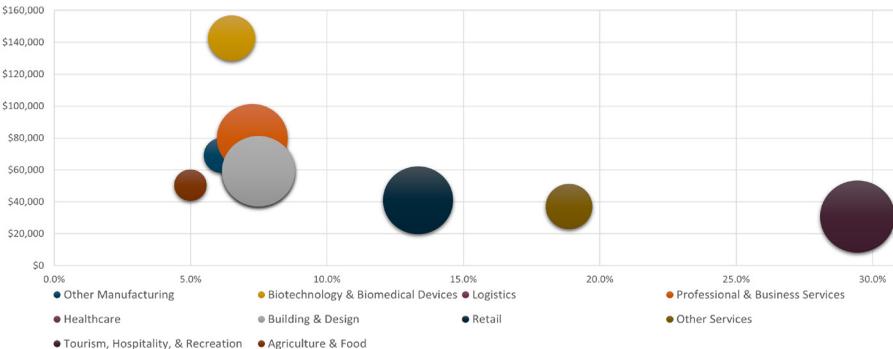
Figure 15: Slow Growth Industries



JobsEQ 2016-2021, Q2

The figure below shows the second group of industry clusters that experienced an increase in employment over the 2020 (Q2) through 2021 (Q2) time period. Retail and Other Services showed growth above 10% as they recovered from large declines in 2020. The largest growth was in Tourism, Hospitality, & Recreation, the hardest-hit industry cluster during the pandemic, with employment growth close to 30%.

Figure 16: High Growth Industries



JobsEQ 2016-2021, Q2

WHY DO THESE INDICATORS MATTER?

As noted above, industry clusters provide immediate insight into North County’s largest drivers of employment and the interconnectedness of the region’s firms. Industry clusters provide a macro-scale understanding of the past, present, and future for the region. Conversely, job quality analysis provides a micro-scale picture of what jobs in North County—and the lives of those who hold these jobs—look like. In unison, these two metrics highlight some of the nuances of the North County economy.

Note: The size of the bubble reflects total North County employment within the respective sector.

Table 9: Industry Cluster Employment and Annual Averages Wages

	Industry Cluster	2021 Employment	Annual Average Wages	% Change (2021-2022)
Slow Growth Industries	Defense, Aerospace, and Transportation Manufacturing	12,269	\$ 110,394	-5.3%
	Education & Knowledge Creation	42,980	\$61,344	1.4%
	Finance & Banking, Insurance, Real Estate	24,156	\$103,156	1.6%
	Public Services & Infrastructure	12,171	\$104,828	1.9%
	Information & Communication	3,674	\$81,784	2.3%
	Information & Communication Technologies	20,465	\$141,534	3.7%
High Growth Industries	Agriculture & Food	10,881	\$50,473	5.0%
	Other Manufacturing	13,659	\$69,093	6.1%
	Biotechnology & Biomedical Devices	22,945	\$142,598	6.5%
	Logistics	16,104	\$66,384	7.3%
	Professional & Business Services	52,072	\$79,822	7.3%
	Healthcare	55,135	\$59,159	7.5%
	Building & Design	19,152	\$84,595	7.9%
	Retail	50,974	\$41,025	13.3%
	Other Services	22,698	\$36,989	18.9%
	Tourism, Hospitality, & Recreation	57,647	\$30,692	29.4%

JobsEQ 2016-2021, Q2

Job Quality

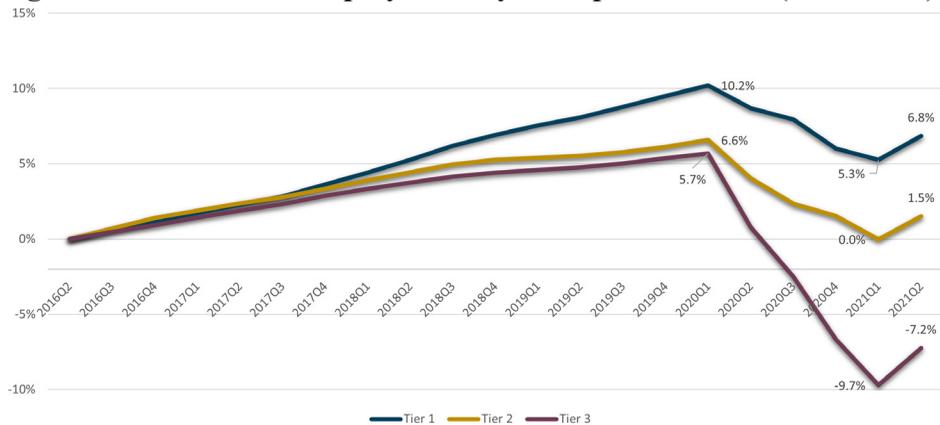
An analysis of job quality analyzes the typical range of pay associated with a particular occupation. This analysis helps us understand an economy’s capacity to create jobs that allow individuals to earn a living wage as well as its economic resiliency.

Table 10: Employment and Employment Growth

Tier 1 Occupations	Tier 2 Occupations	Tier 3 Occupations
Tier 1 occupations are typically the highest-paying, highest-skilled occupations in the economy. This occupational category includes positions such as managers (e.g., Chief Executives and Sales Managers), professional positions (e.g., Lawyers and Physicians), and highly skilled technology occupations, such as scientists, engineers, computer programmers, and software developers.	Tier 2 occupations are typically the middle-skill, middle-wage occupations. This occupational category includes positions such as technicians, teachers, office and administrative positions (e.g., Accounting Clerks and Secretaries), manufacturing, operations, and production positions (e.g., Assemblers, Electricians, and Machinists).	Tier 3 occupations are typically the lowest-paying, lowest-skilled occupations that have historically provided the largest portion of employment in the region. These occupations include positions such as security guards, food service and retail positions, building and grounds cleaning positions (e.g., Janitors), and personal care positions (e.g., Home Health Aides and Child Care Workers).

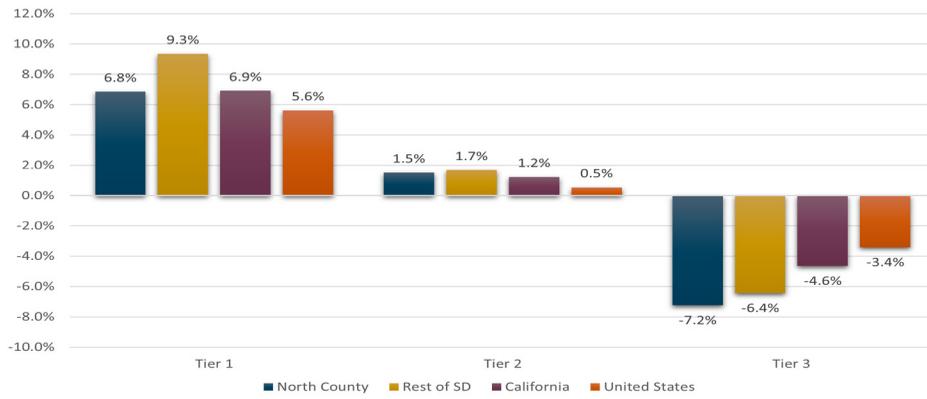
All worker tiers saw a recovery in employment in 2021, although still not at their pre-pandemic levels. Tier 3 employment recovered from the large decline in 2020 but still stays below 2016 employment levels.

Figure 17: Growth in Employment by Occupational Tier (2016-2021)



JobsEQ, 2021 Q2

Figure 18: Job Growth by Occupational Tier



JobsEQ, 2016-2021 Q2

Table 11: 2021 Percentage of Jobs by Job Quality Tier

	Tier 1	Tier 2	Tier 3
North County	23.0%	24.3%	52.7%
Rest of San Diego County	24.6%	23.8%	51.4%
California	22.3%	24.5%	53.1%
United States	22.2%	25.8%	52.0%

JobsEQ, 2022

Economic Distress

Economic distress measures both the challenges households are facing in the current economic environment as well as an assessment of economic resilience (how the region can endure and recover from an economic downturn). The pandemic has shown the importance of both of these indicators.

While poverty rates are considerably higher in certain geographic pockets around North County, the relatively high regional-specific costs in North County mean that living wages are considerably higher than the nation. Living wages, in comparison to poverty rates, include regional differences in costs of housing, food, energy, and other essentials. The living wage in North County is about \$90,800 per year for a family of four (one parent working). This means that it would take more than two tier-3 jobs (lower-skill, lower paying) or about one-and-a-half tier-2 jobs for a family of four (one parent working) to achieve the living wage in North County.

San Diego County’s relatively high debt-to-income ratio is also a cause for concern as we consider economic resilience. On average, households in San Diego County have nearly \$2 of debt for every dollar of annual income⁹. Furthermore, the decline in this ratio – a trend observed nationally and statewide – is occurring at a slower rate than regional neighbors such as Orange and Los Angeles Counties.

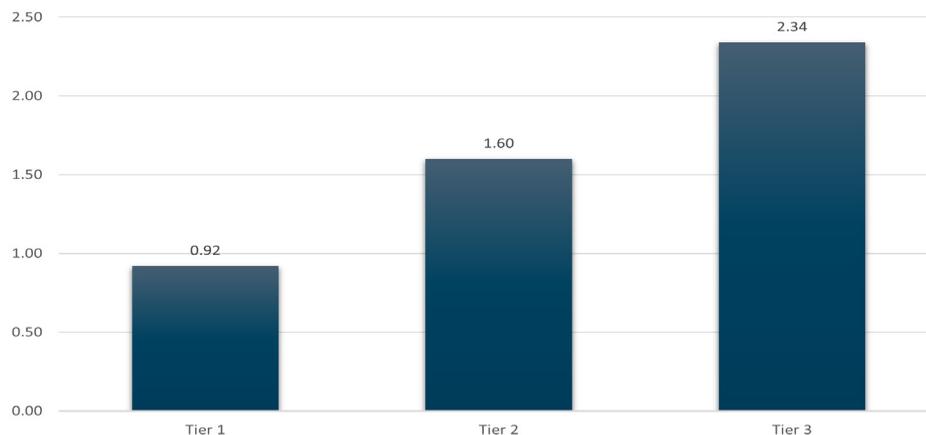
Table 12: Living Wage Definition in San Diego County

Family Size	Yearly Salary	Hourly Wages Required to Achieve Salary
2 Adults & 2 Children	\$90,771	\$43.64

MIT Living Wage Calculator for San Diego County, 2022

Living wages are calculated by factoring the local costs of food, childcare, medical expenses, housing, transportation, and other factors. Poverty rates do not account for these local differences.

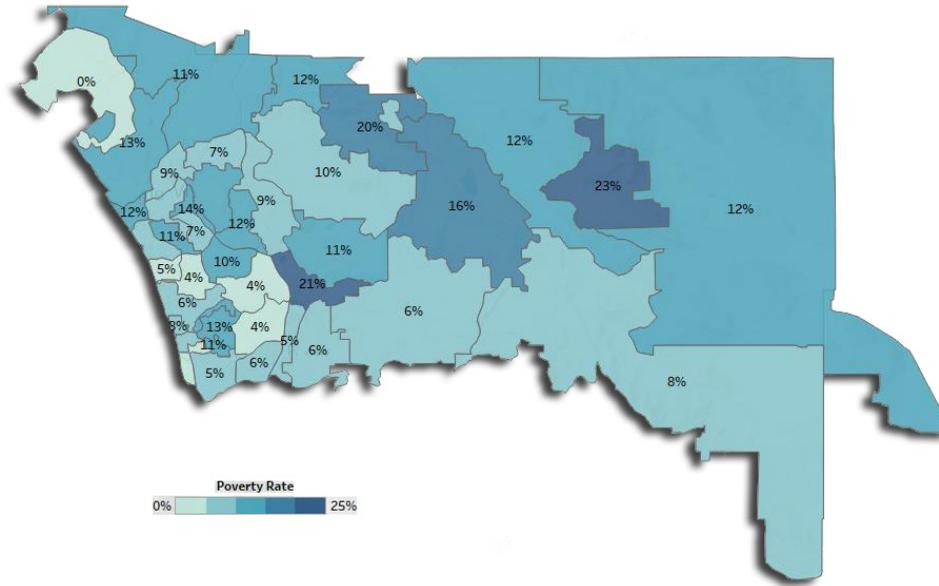
Figure 19: Number of Jobs Needed to Achieve a Living Wage in San Diego County



MIT Living Wage Calculator, San Diego County, 2022

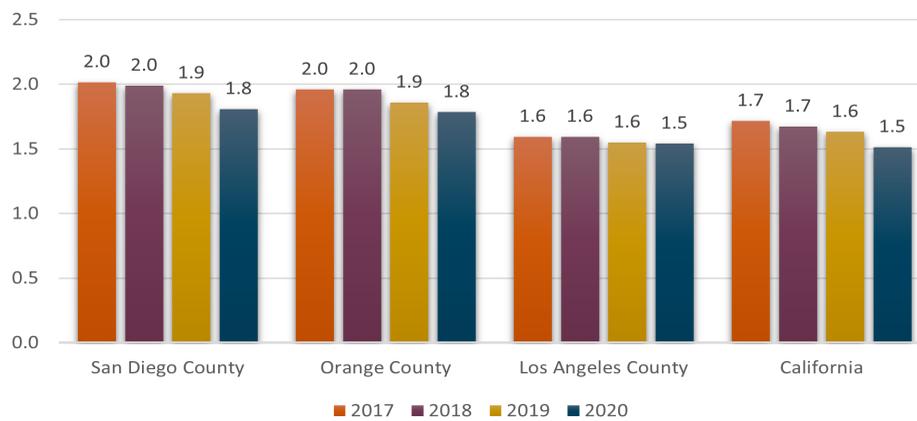
⁹ It is worth noting that this figure does not include student loan debt – a factor which is increasing in scale across the country.

Figure 20: Poverty Rate Among All Residents in North County (2019)



US Census Bureau, 2019 American Community Survey 5-Year Estimates

Figure 21: Household Debt-to-Income Ratio (2017-2020)



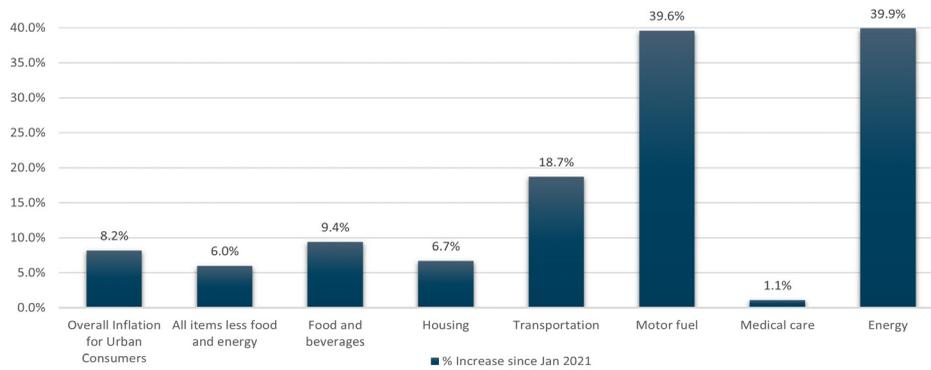
United States Federal Reserve, 1999-2019

San Diego County households have a debt-to-household income ratio that is greater than that in surrounding counties and the state. High debt-to-income ratios can hamper resilience in the event of economic downturn.

Inflation Rates

Consumer Prices in San Diego County have gone up by over eight percent in 2021. The biggest increases were in Fuel and Energy, costs that saw an increase of almost 40% since January 2021. Housing costs, one of the largest expenditures for San Diego households, rose by almost seven percent during 2021.

Figure 22: Cost of Living Increase in San Diego County



BLS CPI-U, 2021

Housing costs have gone up by 6.7% since January 2021

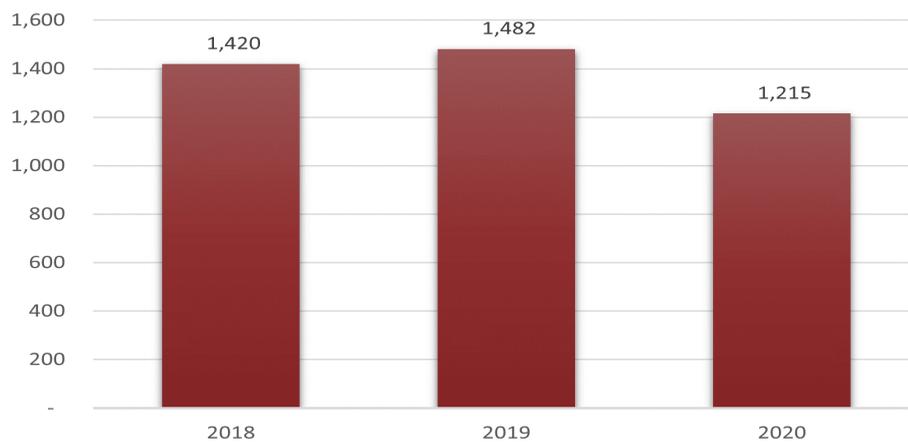


Environment

Clean Energy adoption is crucial to reach environmental goals, and it is increasingly important to long-term employment in the region. As the nation shifts towards clean energy sources, there is increased demand for innovation and technologies that can meet environmental standards. North County has the opportunity to become a supplier of clean energy technologies by investing in current firms and promoting the expansion of the clean energy industry. North County has over 15,000 jobs in clean energy, an industry that is projected to grow in the next years and provide economic resilience to the region.

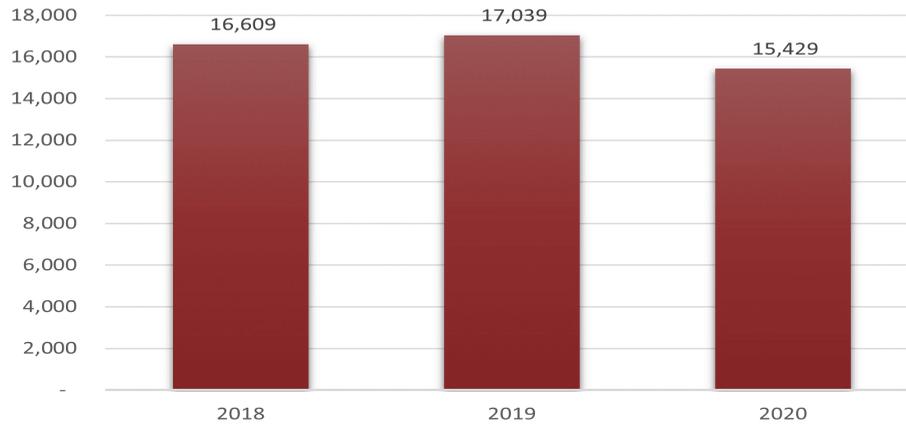
Clean Energy

Figure 23: Total North County Clean Energy Firms



2018-2020 United States Energy and Employment Report (USEER)

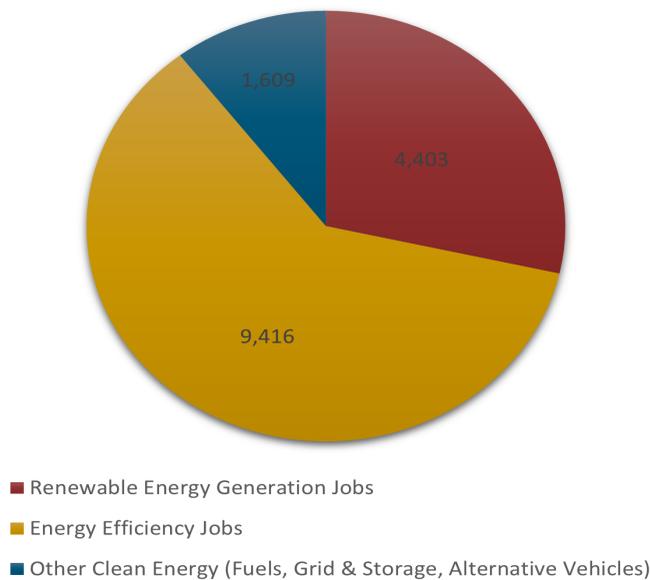
Figure 24: Total Clean Energy Jobs in North County



2018-2020 United States Energy and Employment Report (USEER)

North County had over 1,200 clean energy firms and 15,000 clean energy jobs in 2020. Most of these jobs were in Energy Efficiency and related industries.

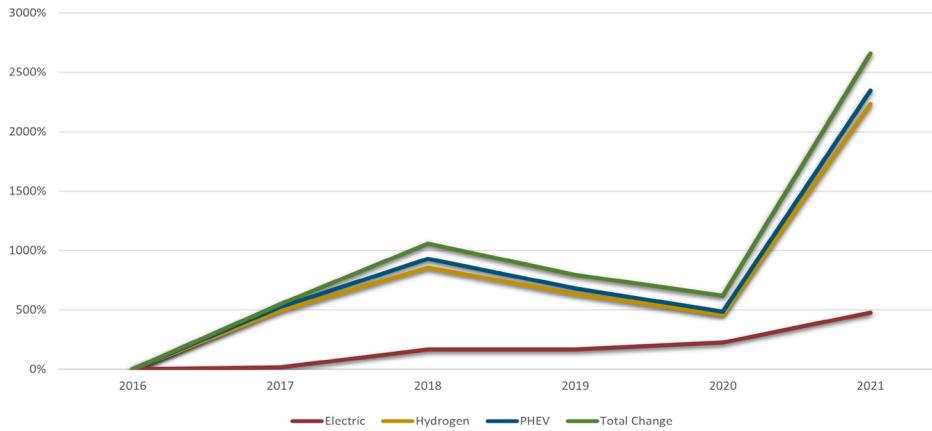
Figure 25: North County Clean Energy Job Composition



2018-2020 United States Energy and Employment Report (USEER)

Renewable energy generation workers include solar firms that are installing home systems and commercial scale systems in North County. Energy efficiency workers work mostly on building envelope, lighting, insulation, windows, doors, ENERGY STAR appliances, HVAC systems, etc.

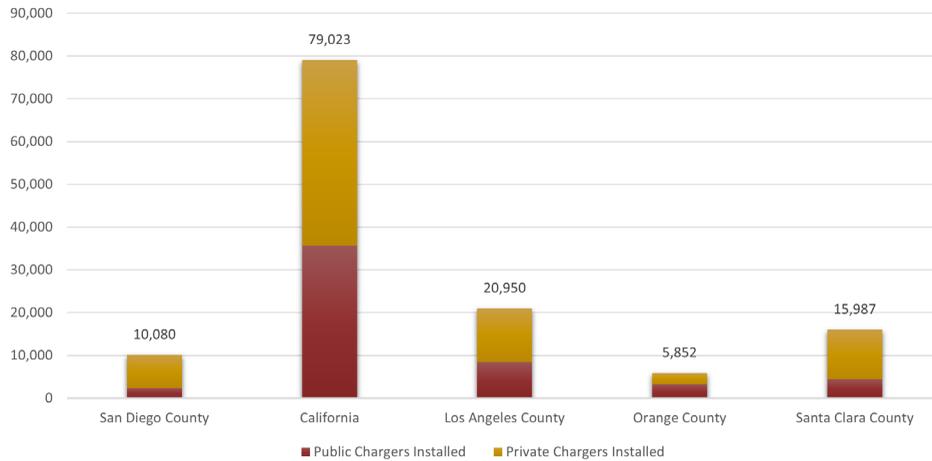
Figure 26: Z-EV Adoption in San Diego County as Percentage Growth Since 2016



California Clean Energy Commission, 2022

2021 saw a major increase in adoption of Hydrogen and Plug-In Hybrid vehicles in North County. Electric vehicles also continue to increase in popularity among North County residents.

Figure 27: Z-EV Charging Infrastructure in San Diego County (2021)



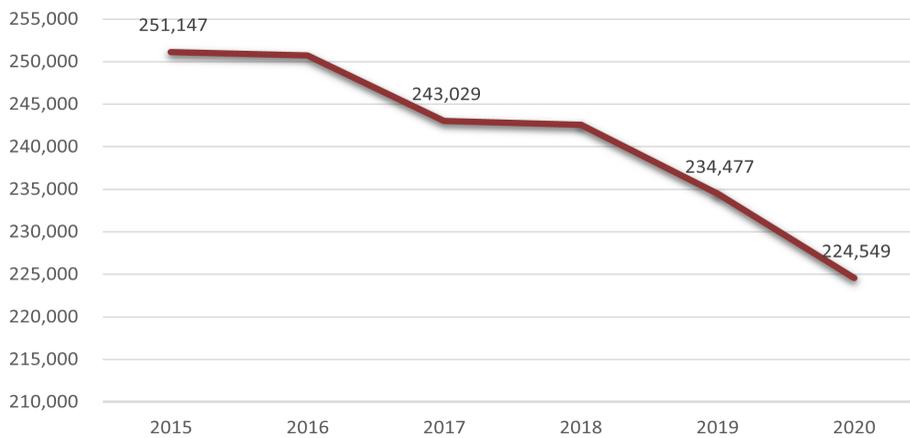
California Clean Energy Commission, 2022

On a per-capita basis San Diego’s charging infrastructure lags behind Santa Clara County. Many North County jurisdictions have continued to encourage the build out of the charging network. This remains, however, both an opportunity to help with combating climate change and to create opportunities for additional jobs and employment growth.

Agriculture

Agriculture is a significant economic driver in San Diego County. The overall value of commercial agriculture in San Diego County increased 0.8% from 2019 to 2020. This change is largely due to a 8% increase in the value of the Bedding Plants, Color, Perennials, Cacti & Succulents crops together with a 9% increase in avocados¹⁰. Figure 28 and Figure 29 illustrate crop values have continued to rise despite crop acreage steadily declining.

Figure 28: Total San Diego County Acreage Devoted to Agriculture



San Diego County Crop Statistics Annual Report, (2015-2020)

Figure 29: Total Value of San Diego County Agriculture Production



San Diego County Crop Statistics Annual Report, (2015-2020)

¹⁰ County of San Diego 2020 Crop Statistics & Annual Report

Table 13: San Diego County Crops (2020)

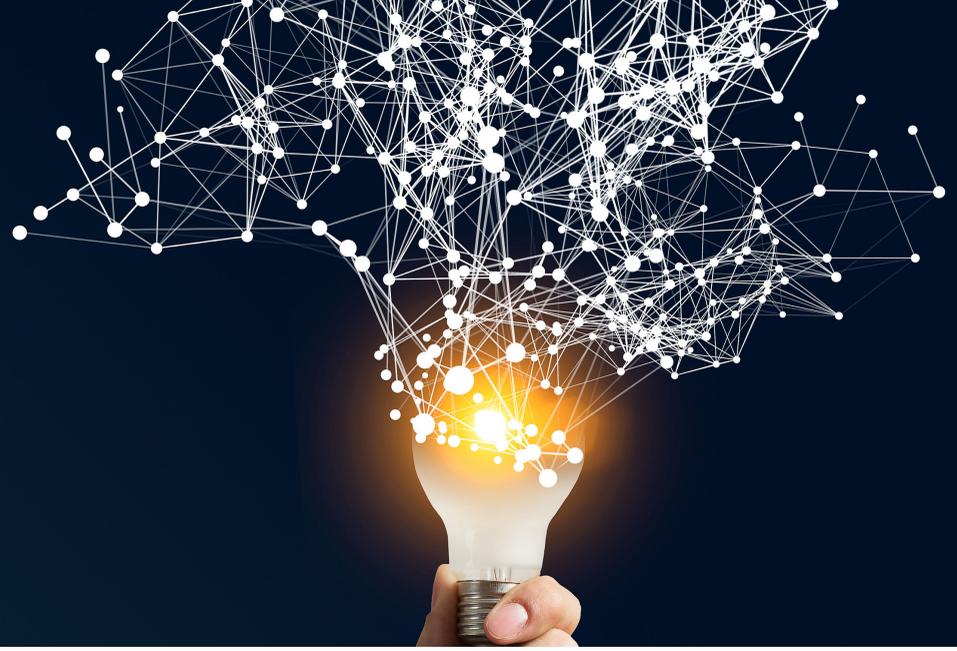
Top 10 Crops in 2020	
Ornamental Trees and Shrubs	\$432,039,762
Bedding Plants and Herbaceous Perennials	\$431,766,617
Indoor Flower & Foliage	\$307,662,324
Avocados	\$152,957,658
Vegetables, Other	\$106,136,857
Lemons	\$79,334,418
Livestock & Poultry	\$40,676,017
Oranges	\$35,935,060
Other Cut Flowers & Bulbs	\$35,805,590
Citrus, Avocado, & Subtropical Fruit Trees	\$27,435,499

San Diego County Crop Statistics Annual Report, 2021

Table 14: San Diego County Crops (2015)

Top 10 Crops in 2015	
Ornamental Trees and Shrubs	\$409,500,000
Indoor Flower & Foliage	\$344,167,450
Bedding Plants and Herbaceous Perennials	\$215,425,000
Avocados	\$110,454,004
Cacti and Succulents	\$72,600,132
Lemons	\$70,393,944
Tomatoes	\$58,666,087
Eggs, Chicken Market	\$40,998,211
Strawberries	\$38,360,941
Other Cut Flower Products	\$37,998,381

San Diego County Crop Statistics Annual Report, 2016



Innovation

The innovation sector plays an important role in North County. Now, as the recovery from the pandemic is more accelerated, the role of innovation is more crucial than ever with venture capital and R&D spending flowing into the region at near all-time highs.

This section highlights an array of indicators that display different aspects of innovation in North County. These metrics include venture capital raised, the ratio of business births and deaths, research and development funding, and patent approvals by inventors living in North County.

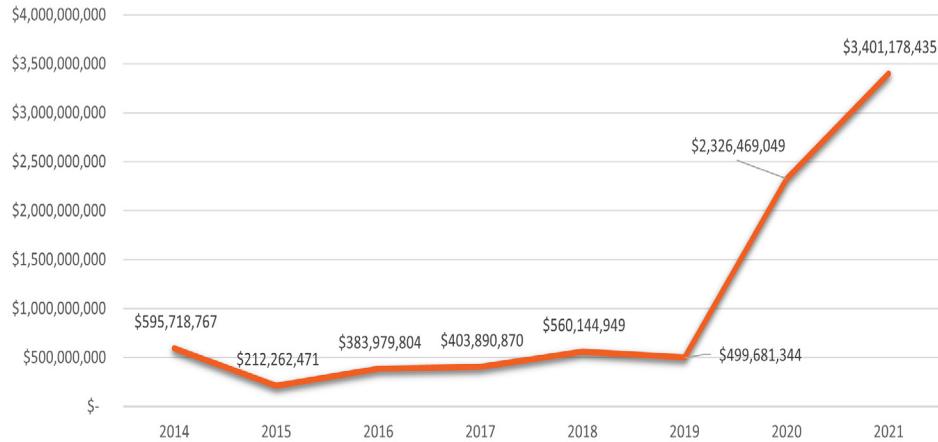
Innovation Funding

North County businesses raised more than \$3.4 billion in venture capital in 2021. Realty Income Corporation, located near the intersection of Highway 5 and 56, raised \$670 million. Ionis Pharmaceuticals in Carlsbad raised \$550 million, and Vuori in Carlsbad raised \$400 million. Overall, North County businesses raised almost 50% more money in 2021 than the previous year.

WHY DO THESE INDICATORS MATTER?

Innovation funding captures a broad swath of innovation activity across a range of product development stages, from seed funding for initial companies to later stage B and C funding

Figure 30: Total Innovation Capital Raised Across North County

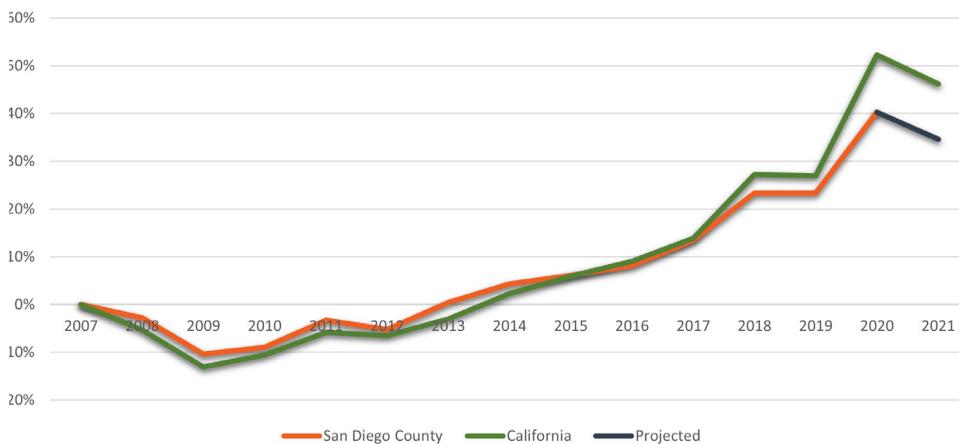


Crunchbase, 2022

New Business Formations

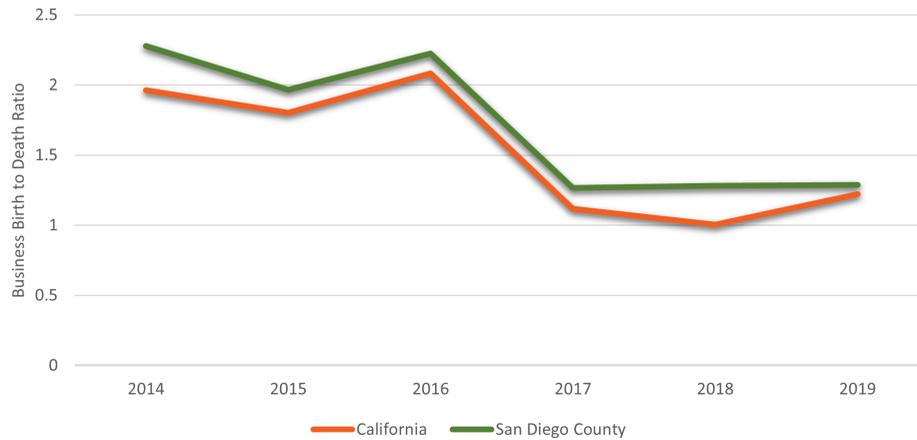
The growth in the number of businesses in a region is an indicator of a region’s economy and business climate. Having seen steady growth between 2009 and 2018, new business formations increased substantially in 2020 but declined statewide in 2021. While this data is currently unavailable at the county level, if San Diego County continues to trend closely with new business formations seen in California, new business formations throughout the county will have declined by roughly 5% between 2020 and 2021 (Figure 31). San Diego County also enjoys a slightly greater business birth-to-death ratio than the statewide average (Figure 32).

Figure 31: New Business Formations (Growth from 2007 Baseline)



U.S. Census Bureau Business Formation Statistics. Experimental Data

Figure 32: San Diego County Business Birth to Death Ratio

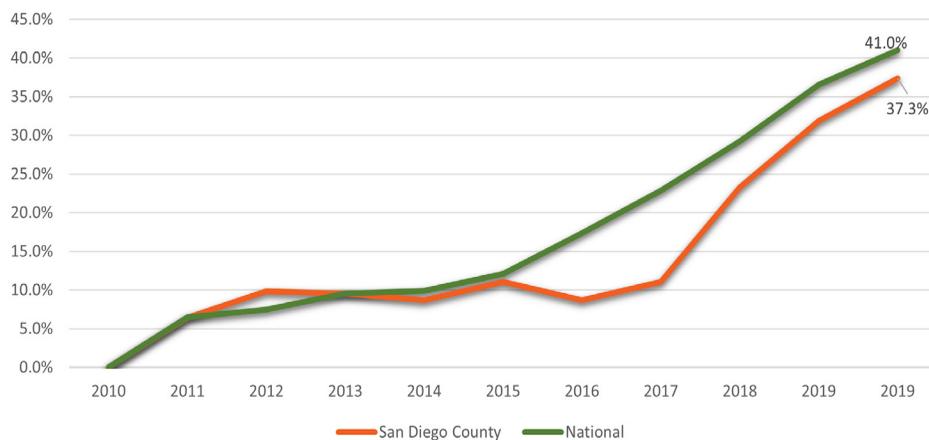


U.S. Census Bureau Business Formation Statistics. Experimental Data

Research and Development

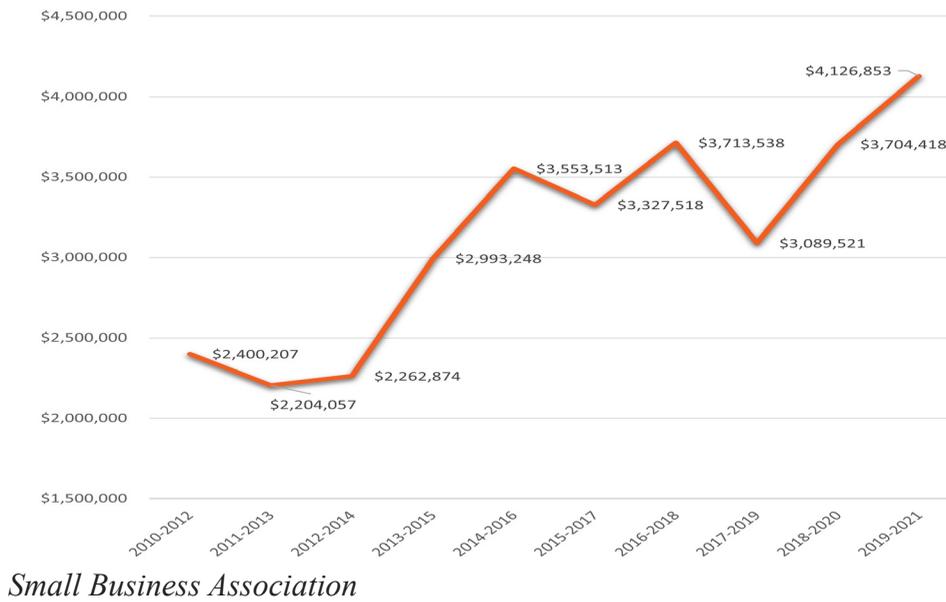
San Diego County and North County have seen dramatic increases in research and development (R&D) activities. R&D funding and activity is an important source for start-ups and entrepreneurs, so a robust R&D ecosystem is important to innovation. UC San Diego continues to be the greatest source of R&D expenditures, receiving and granting over \$1.4 billion for research and development in 2020 (Figure 33). North County resident researchers received a significant amount of Phase I Small Business Innovation Research (SBIR) and Small Business technology Transfer (STR) funding in 2020, receiving nearly \$6.1 million in research grants (Figure 34).

Figure 33: R&D Expenditures in San Diego County Universities; Percentage Increase Since 2010



National Center for Science and Engineering Statistics, Higher Education Research and Development Survey

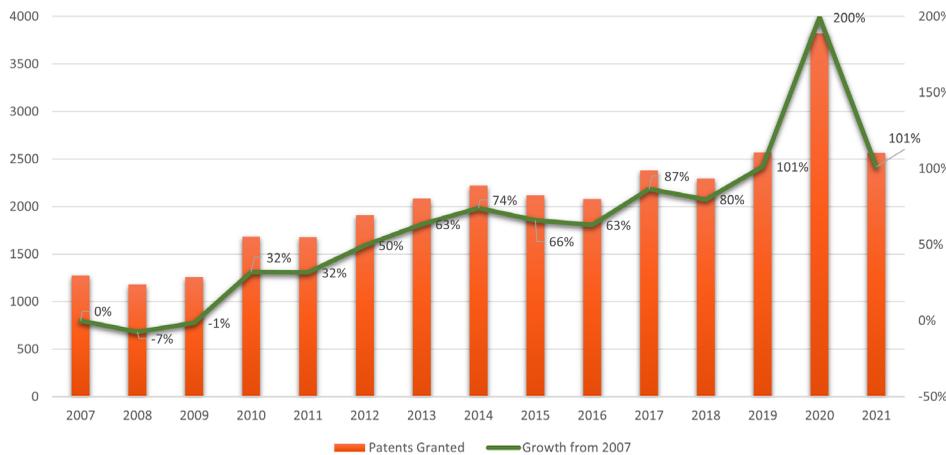
Figure 34: Phase 1 SBIR and STTR Grant Receipts in North County



Patents

Patents are one of the earliest steps an inventor or entrepreneur takes when creating a novel product or design. Patents often lead to new products, new businesses, and even encourage other new ideas. The high number of approved patents by North County inventors suggests that the region continues to attract innovative companies and entrepreneurs that are looking to introduce new technologies and products to the marketplace.

Figure 35: Approved Patents by Inventors in North County 2007-2021



WHY DO THESE INDICATORS MATTER?

Patents are important leading indicators of innovation since they are often one of the first steps an inventor or entrepreneur takes upon coming up with a new invention, product, or technique.

USPTO Patents View Data Query. Search used an inventor database with last known location by city



Education

Education is increasingly important in the world of work. As technology plays a growing role both in and out of the office, a population that can learn, communicate, understand new technologies, and think critically is crucial to North County's future workforce. These indicators address the educational attainment of the current working population, as well as the educational success and challenges of the youth and young adults that represent the future workforce of North County.

Some of the education indicators in this year's NCI (2022) are carried over from the 2020 NCI as most schools and educational institutions did not complete their standardized testing in the 2019 to 2020 or 2020 to 2021 school years due to the COVID-19 pandemic, and other degree completion data was not available.

In aggregate, the education metrics highlight North County's success in education. More than four-in-ten adults have a bachelor's degree or advanced degree, and the proportion of adults without a high school diploma is notably lower than surrounding counties. North County's current students are also doing relatively well in their educational pursuits, exceeding state proficiency averages in both Math and English Language Arts (ELA).

WHAT ARE WE MEASURING & WHY DOES IT MATTER?

The North County Education Indicators include the current educational attainment of the adult population, as well as a substantial examination of key metrics along the education pipeline, ranging from youth and young adults to college graduates. Education is increasingly important in the world of work, and the educational progress and success of North County's youth will play a substantial role in the region's future.

Educational Attainment

North County has an exceptionally well-educated population. More than 44% of North County's population 25 and older have a bachelor's degree or higher. This rate is considerably higher than statewide average (35%) and comparable counties, apart from Santa Clara County. A high rate of educational attainment among the working-aged population is important to economic development, as it signals to businesses and entrepreneurs that the region has an adequate workforce to support their talent needs.

WHY DOES IT MATTER?

A region's educational attainment often provides insights into the region's workforce and workforce potential. A highly educated adult population, for example as seen in North County, suggests that the local workforce is likely well-equipped to support innovative and technology-based industries that require advanced degrees.

Table 15: Educational Attainment for Working Aged Adults (25 Years and Older)

	No Highschool Diploma	High School Graduate	Some College, No Degree	Associate Degree	Bachelor's Degree	Postgraduate Degree
North County	10.3%	16.3%	21.4%	7.9%	26.2%	17.9%
Rest of San Diego County	12.9%	19.3%	22.4%	8.6%	23.0%	13.8%
California	16.1%	20.4%	20.9%	8.0%	21.6%	13.1%
Orange County	14.0%	17.2%	19.7%	7.8%	26.4%	14.9%
Los Angeles County	20.2%	20.4%	18.9%	7.0%	21.8%	11.7%
Santa Clara County	11.3%	14.0%	14.5%	6.7%	27.9%	25.6%
United States	11.5%	26.7%	20.3%	8.6%	20.2%	12.7%

US Census, ACS 5-Year Estimates, 2020

Performance & Completions

In the 2018 to 2019 school year, students across North County scored above the state averages both in Math and English Language Arts proficiency. Furthermore, North County proficiency averages tend to be higher than many neighboring counties. Meanwhile, North County continues to observe a rapid increase in STEM graduation from California State University San Marcos and its two community colleges.

Table 16: CAASPP Math Proficiency Comparison (2018-2019)

North County	California	Riverside County	Los Angeles County	San Diego County	Santa Clara County	Orange County
52.7%	37.4%	34.1%	39.1%	45.0%	56.6%	50.4%

CA Ed Data

Table 17: CAASPP English Language Arts Proficiency Comparison (2018-2019)

North County	California	Riverside County	Los Angeles County	San Diego County	Santa Clara County	Orange County
62.7%	50.9%	47.6%	50.2%	56.60%	63.0%	59.5%

CA Ed Data

WHY DOES IT MATTER?

Statewide tests scores indicate that higher rates of students in North County are at least proficient in the critical subjects of Math and English Language Arts. Additionally, North County's growing number of graduates in STEM programs suggests that increasing numbers of students have foundational skills that will better prepare them for the jobs of the future.

Table 18: 2020 Degree Completions in North County

	All Degrees Awarded	STEM Degrees	Non-STEM Degrees
California	347,189	181,857	165,332
San Diego County	52,473	29,167	23,306
North County	5,916	2,341	3,575

JobsEQ, 2022

Disadvantaged Populations

North County generally has lower levels of disadvantaged student populations – including those who are learning English and those who receive free or reduced-price meals – than the state averages.

WHY DOES IT MATTER?

Knowing the number and location of students with disadvantages is the first step in providing additional support and services to give students their best chance at success.

Table 19: English Language Learner Population Comparison

North County	California	Riverside County	Los Angeles County	San Diego County	Santa Clara County	Orange County
13.2%	17.7%	16.5%	16.9%	17.2%	19.9%	20.3%

CA EDD Data

Table 20: Students Who Receive Free or Reduced Price Meals Comparison

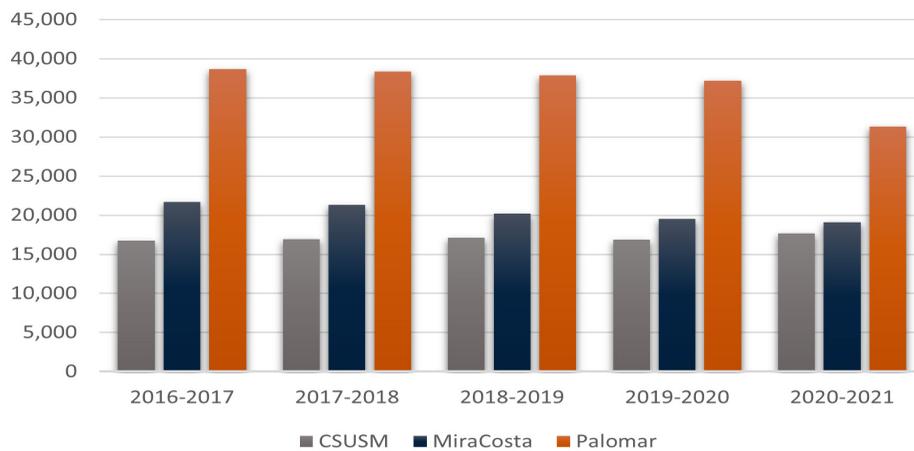
North County	California	Riverside County	Los Angeles County	San Diego County	Santa Clara County	Orange County
40.7%	58.9%	65.4%	68.7%	49.0%	32.4%	49.1%

CA EDD Data

North County Higher Education

Public higher education institutions are characterized by the funding of state government. North County boasts three public colleges with a combined student population of over 67,000 in the 2020-2021 academic year.

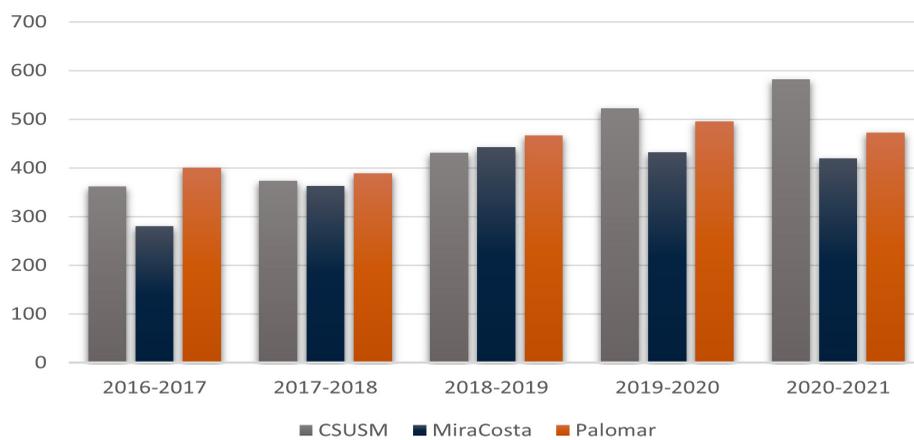
Figure 36: North County Public Higher Education Total Student Population



CSUSM, MiraCosta, Palomar, 2022

Science, technology, engineering, and math (STEM) degrees reflect education relevant to industries with fast growing demand. The U.S. Department of Security publishes a STEM Designated Degree Program that reflects a complete list of fields of study that are considered STEM options. Data illustrated within Figure 37 follows The U.S. Department of Security’s STEM designations.

Figure 37: North County Public Higher Education STEM Completions



CSUSM, MiraCosta, Palomar, 2022



Place

Quality of life is an important factor as they positively correlate with business talent attraction. Other indicators, like commuting times, offer insights into factors that may compound inequality in the region and may erode the quality of life for residents and workers in the region.

Housing

The cost of living and working in North County remains high. Median home prices in North County have risen since 2016, and are among the highest in comparative regions, surpassed only by Santa Clara County. In 2020, the median home price was \$730,000, a five-year increase of almost \$160,000. North County has a relatively low share of residents who rent their domiciles, but of those that do rent, about one in six (16%) spend 30% or more of their income on housing. High housing costs can make living in a region unsustainable for some and can contribute to issues for employers such as hiring and retention, particularly of lower-wage workers.

WHAT ARE WE MEASURING & WHY DOES IT MATTER?

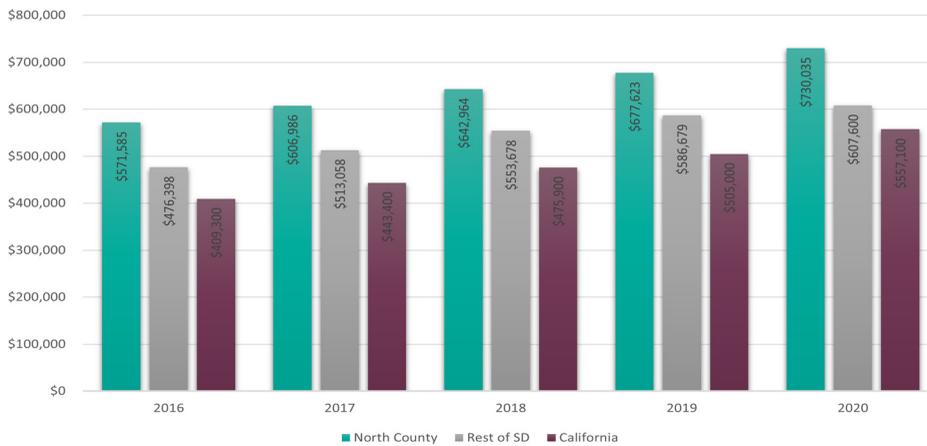
The North County Place Indicators provide metrics that highlight crucial aspects of quality of life. Quality of life is a primary driver of economic development, and it continues to play a crucial role in North County's success in drawing top businesses and talent. These indicators also provide a glimpse into some of North County's greatest challenges, as issues such as the cost of housing and commuting times can make the region less accessible, compound inequalities, and erode quality of life for residents, workers, and visitors to the region.

WHY DOES THIS MATTER?

Housing is often the largest expense for households. Given North County’s relatively high housing costs, it is important to track housing costs, availability, and vacancy. These metrics provide a picture of affordability and sustainability in the region, particularly for the populations that are already struggling to make ends meet.

Housing availability and relative costs also play a role in economic development. Businesses and entrepreneurs are less likely to relocate or start a business in an area where the costs of housing require substantial salary increases to maintain standards of living. Additionally, high housing costs can impact talent, as workers may choose one job over another if one has substantially lower housing costs, provided all other aspects are constant. Given the role that housing can play in economic development, these Indicators are key for North County.

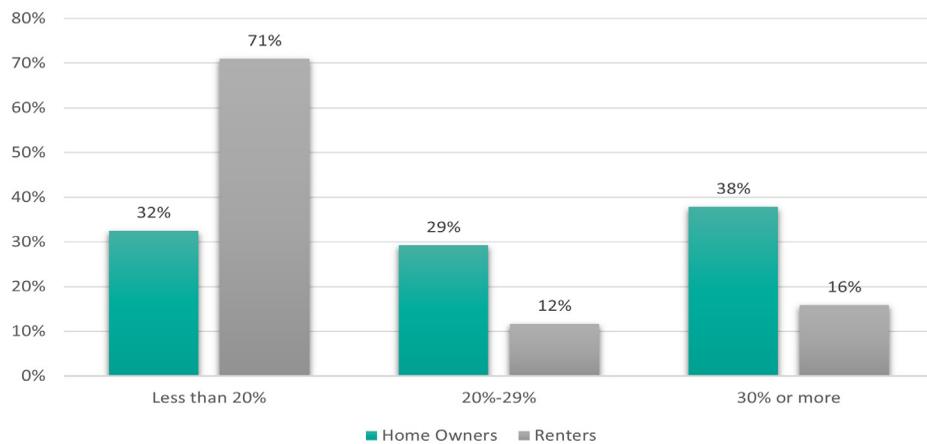
Figure 38: Median Home Prices in North County



US Census, ACS 5-Year Estimates, 2020

Median home prices have been on the rise since 2016. However, North County has consistently had higher median home prices compared to the rest of San Diego and California.

Figure 39: Housing Costs as a Percentage of Household Income



US Census, ACS 5-Year Estimates, 2020

Over 70 percent of renters spend less than 20 percent of their income on housing compared to approximately one third of residents paying off their mortgages.

Table 21: Regional Housing Comparison (2020)

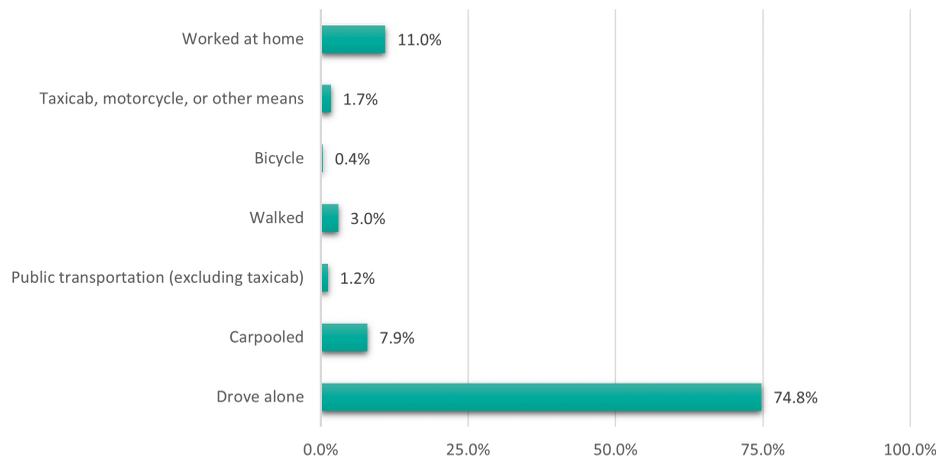
	Median Home Price (2020)	Homeowner Vacancy	Rental Vacancy	Renter- Occupied Housing Units (% of Occupied Units)
North County	\$730,035	0.5%	1.4%	38.0%
Rest of San Diego County	\$607,600	0.4%	1.9%	50.7%
San Diego County	\$595,600	0.5%	1.7%	46.1%
Orange County	\$703,800	0.5%	1.6%	42.8%
Los Angeles County	\$615,500	0.4%	1.9%	54.0%
Santa Clara County	\$1,061,900	0.3%	1.9%	43.6%
California	\$538,500	0.5%	1.6%	44.7%

JobsEQ, 2022

Transportation

Commute times in North County Inland have declines over the past five years, giving North County an average commute time equal to or lower than the surrounding areas and the state average. The mean commute time for North County workers is 27 minutes. North County’s residents’ choice of commuting methods has also changed. Carpooling became less popular since 2015, declining by 6%, while walking and driving alone has increased in popularity over the same period. The number of North County residents that work from home increased by 36% from 2015 to 2020, largely driven by the effects of the COVID-19 pandemic.

Figure 40: Commuting Patterns in North County (2020)

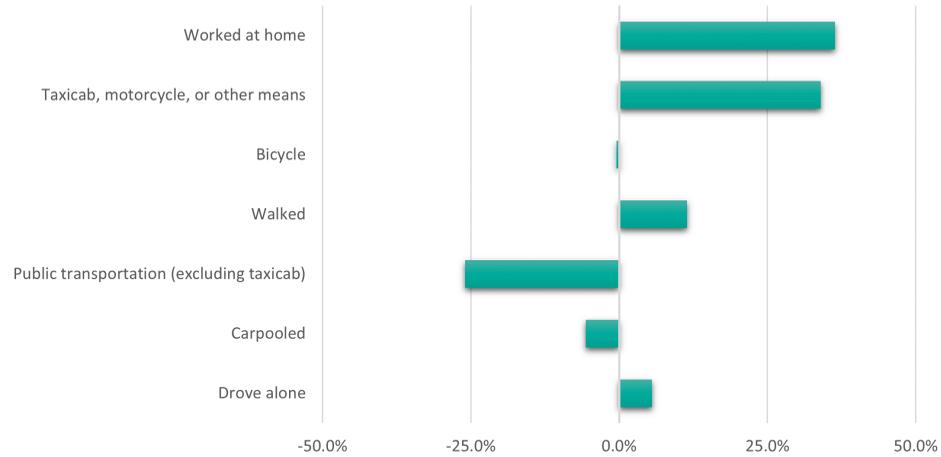


US Census, ACS 5-Year Estimates, 2020

WHY DOES IT MATTER?

Commute times can play a pivotal role in economic development, as businesses and talent may be hesitant to expand or relocate in a region that is not easily accessible for the workforce.

Figure 41: Change in Commuting Patterns in North County (2015 vs. 2020)



US Census, ACS 5-Year Estimates, 2020

**Mean Commute
Time for North
County
Residents
27.1 Minutes**

A continuing challenge is how to increase the share of commuters using public transportation in North County. As show above, since 2015 the percentage of North County residents indicating that they commute using public transportation has declined by 25%. Given climate goals and efforts at increasing sustainability, this trend is a vexing one that requires concerted public policy attention and innovation.

Commercial Real Estate

Office and industrial rents directly reflect the business health across a region. Figure 40 illustrates 2022 YTD monthly price per square foot for each city throughout North County. Average commercial rents rank highest in North Beach Cities which include Solana Beach, Del Mar, and Encinitas.

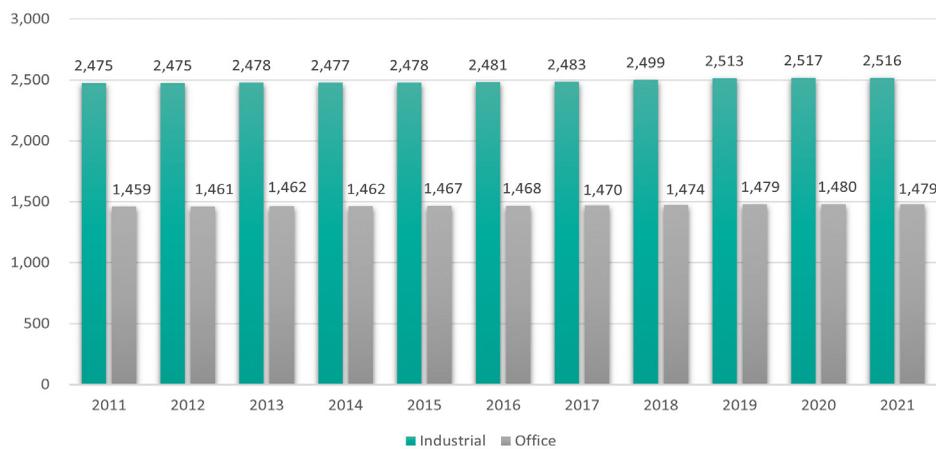
Figure 42: Average North County Commercial Rents per Sq./ Ft.



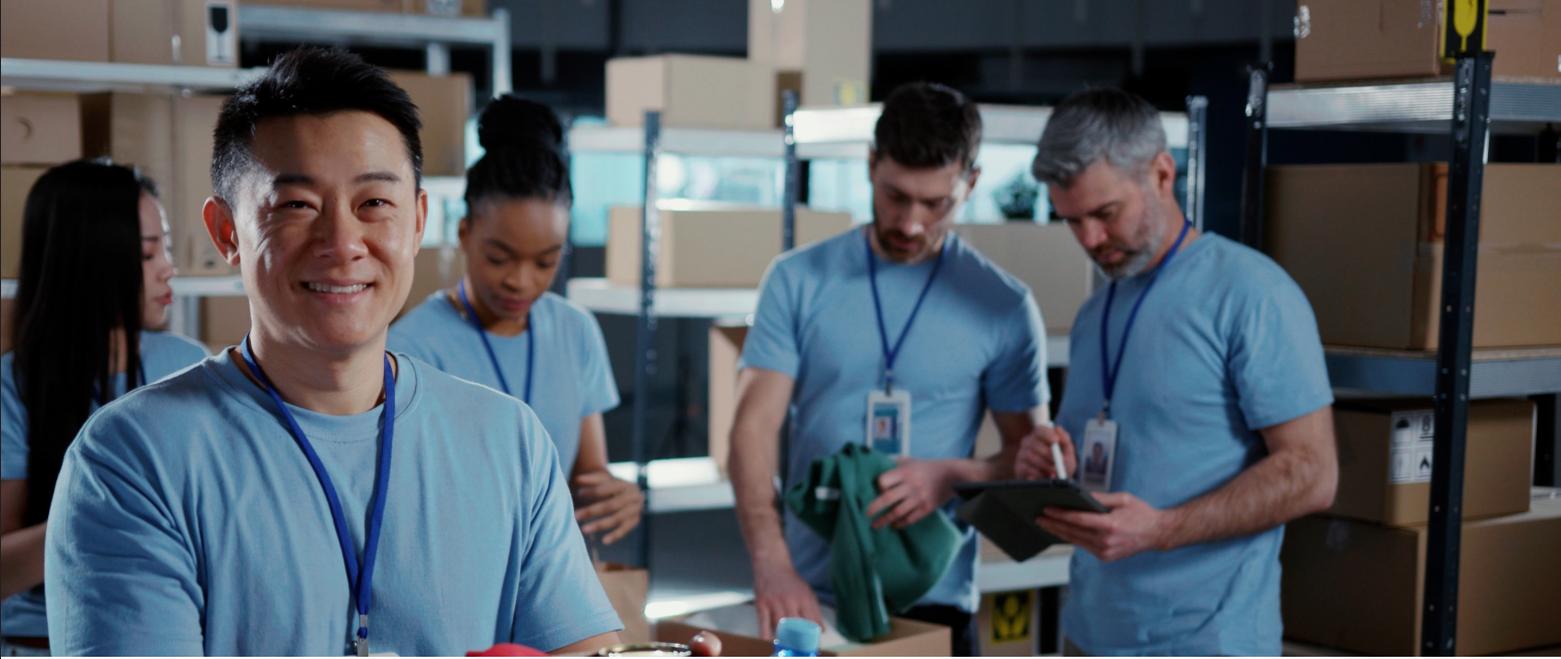
Lee & Associates - North San Diego County, 2022

Continued business growth spurs increasing demand for office and industrial spaces. Over the last 10 years both office and industrial inventory has grown at a modest pace of less than 2% annually. Expected future business growth (see pages 23-27) will increase this demand for more inventory in the years to come.

Figure 43: Annual North County Commercial Inventory (Individual Buildings)



Lee & Associates - North San Diego County, 2022

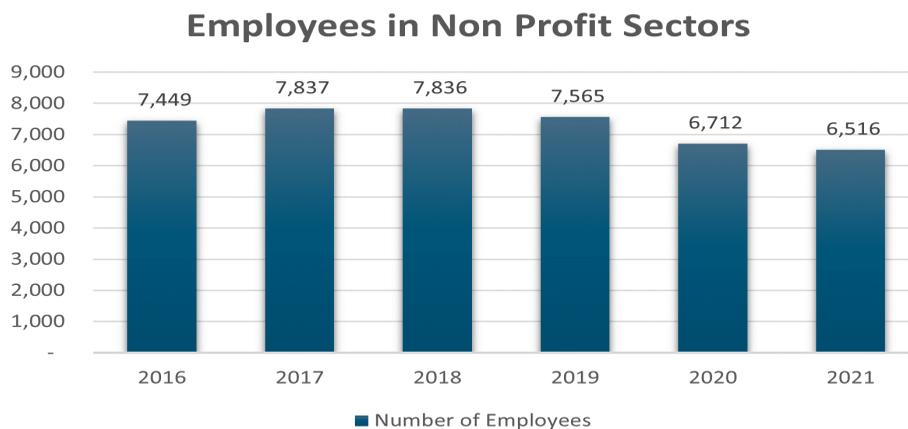


Philanthropy

Non-Profit Ecosystem

The non-profit sector in North County employs more than 6,000 workers. While the majority of non-profits in San Diego County are headquartered closer to the City of San Diego, North County is home to several critical non-profits such as Solutions for Change and Interfaith Community Services. The region has also seen the emergence of several key community foundations that make hundreds of thousands of dollars in grants each year to North County organizations.

Figure 44: Non-Profit Employment



Jobs EQ, 2021 Q3

San Diego Foundation Regional Affiliates Program

Six Community Foundations, affiliated with and supported by The San Diego Foundation, has awarded over \$6.75 million dollars to more than 75 unique North County non-profits. The foundations are locally run by community leaders with all grants designed to support specific communities. Community members give annually, making a lasting impact and creating endowments for their community to support the emerging needs in each community in perpetuity.

Table 22: North County Regional Affiliates Grant Giving, 2021

Foundation Name	2021 Grant Making	2022 Grant Making
4SRanch~ Del Sur Community Foundation	\$16,500	\$25,000
Carlsbad Charitable Foundation	\$278,778	\$121,396
Escondido Community Foundation	\$372,825	\$228,000
Oceanside Community Foundation	\$94,500	\$158,000
Ramona Community Foundation	\$34,500	\$37,500
Rancho Bernardo Community Foundation	\$82,000	\$55,000

San Diego Foundation, 2022

North County Philanthropy Ecosystem

Table 23: Top Philanthropies in North County by Gross Receipts

Name	City	Gross Receipts	Assets
TrueCare	San Marcos	\$79,527,034	\$87,141,898
Vista Community Clinic	Vista	\$69,090,344	\$65,167,073
San Diego Hebrew Homes	Encinitas	\$21,164,507	\$46,098,012
The California State University San Marcos Foundation	San Marcos	\$17,461,089	\$40,874,551
Indian Health Council Inc	Valley Center	\$31,668,747	\$36,674,725
Interfaith Community Services, Inc.	Escondido	\$20,058,709	\$20,058,709
Hospice of the North Coast	Carlsbad	\$13,064,898	\$16,219,061
Solutions for Change, Inc.	Vista	\$3,638,996	\$13,355,941
Legacy Endowment-The Community Foundation	Bonsall	\$3,593,124	\$12,570,742
San Diego Botanic Garden	Encinitas	\$3,699,549	\$3,699,549

Guidestar, 2022

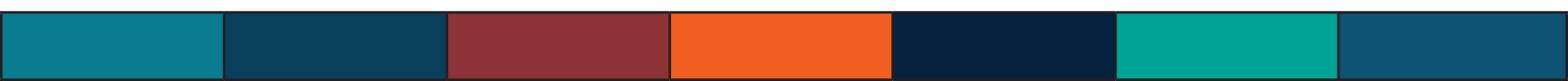


Quick Facts: 9 Incorporated North County Cities

Pages 54- 71 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 was sourced with the most up to date information possible as of Q2, 2022. Data reflects the same sources unless otherwise requested by the individual city.

The resident composition and the largest industries sections benchmark each city's statistics against national averages.



Carlsbad



2021 Population

*ESRI, 2021**

112,930



2022 Employment

*ESRI, 2021**

80,858

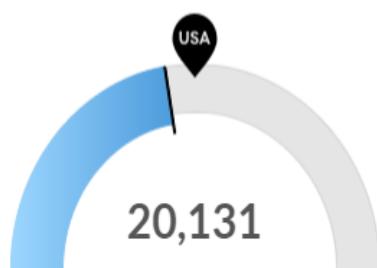


Median Household Income

*ESRI, 2021**

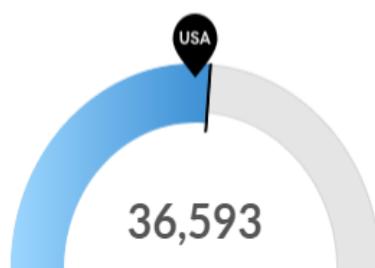
\$120,203

Figure 45: Resident Composition



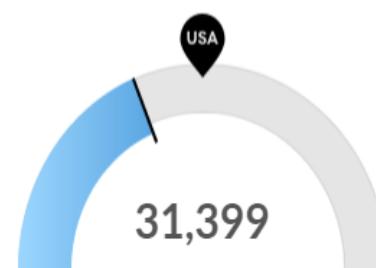
Millennials

Your area has 20,131 millennials (ages 25-39). The national average for an area this size is 23,532.



Retiring Soon

Retirement risk is about average in your area. The national average for an area this size is 33,986 people 55 or older, while there are 36,593 here.



Racial Diversity

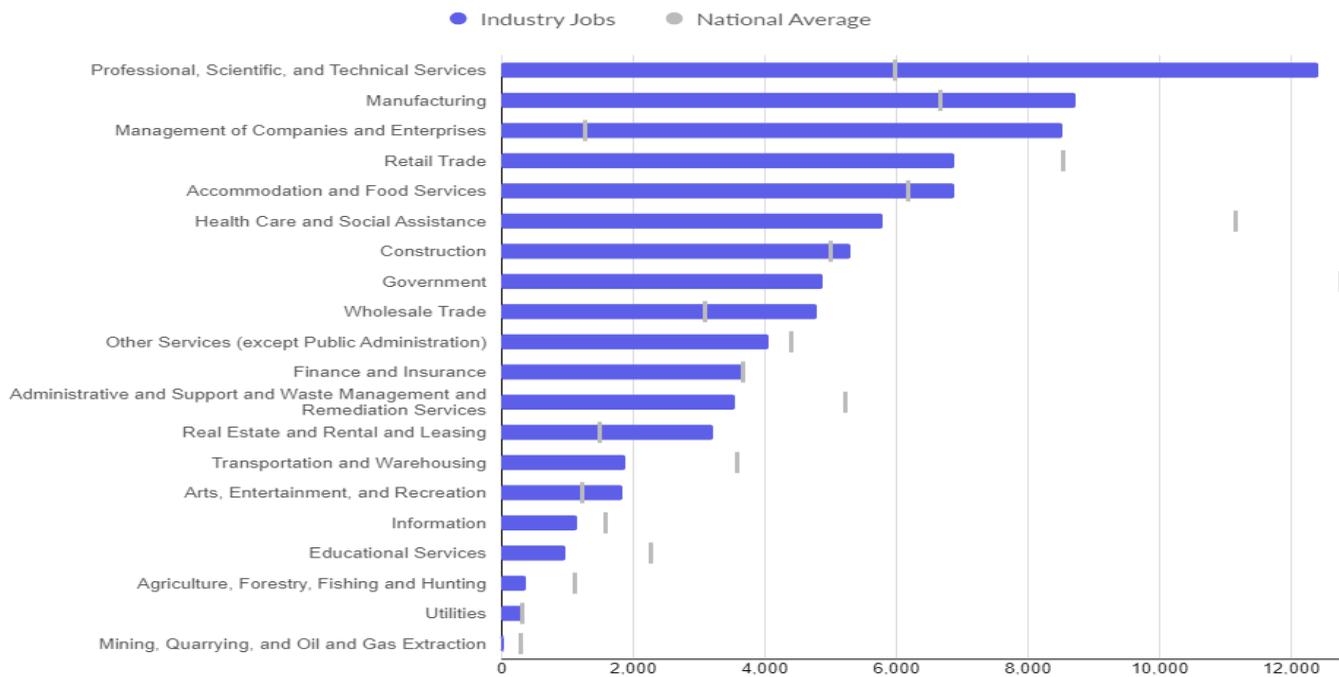
Racial diversity is low in your area. The national average for an area this size is 45,994 racially diverse people, while there are 31,399 here.

EMSI, 2022

**Source varies per City of Carlsbad request*

Figure 46: Largest Industries in Carlsbad

Largest Industries



EMSI, 2022



2021 Housing Units

ESRI, 2021*

44,107



Bachelor's Degree Attainment

2019 1-year ACS

61.1%

Adults 25 years or older



Average Travel Time to Work

2018 5-year ACS

28.2

Minutes

Del Mar



2021 Population

CA Department of Finance, E5 Estimates

4,258



2022 Employment

Emsi, 2022

9,046

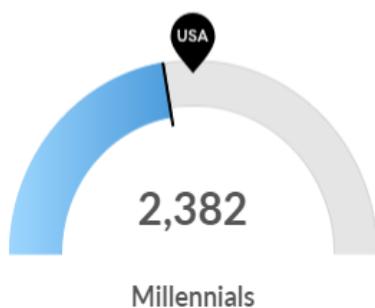


Median Household Income

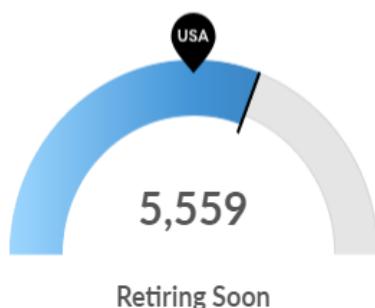
2018 5-year ACS

\$110,966

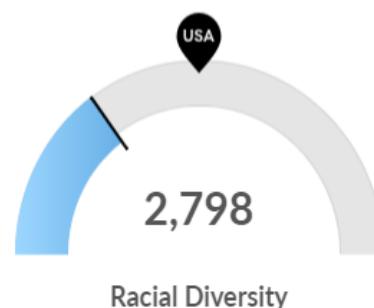
Figure 47: Resident Composition



Del Mar, CA (in San Diego county) (ZIP 92014) has 2,382 millennials (ages 25-39). The national average for an area this size is 2,786.



Retirement risk is high in Del Mar, CA (in San Diego county) (ZIP 92014). The national average for an area this size is 4,024 people 55 or older, while there are 5,559 here.



Racial diversity is low in Del Mar, CA (in San Diego county) (ZIP 92014). The national average for an area this size is 5,445 racially diverse people, while there are 2,798 here.

EMSI, 2022

Figure 48: Largest Industries in Del Mar

Largest Industries



EMSI, 2022



2021 Housing Units

CA Department of Finance, E5 Estimates

2,633



Bachelor's Degree Attainment

2019 1-year ACS

75.2%

Adults 25 years or older



Average Travel Time to Work

2018 5-year ACS

25.7

Minutes

Encinitas



2021 Population

CA Department of Finance, E5 Estimates

62,289



2022 Employment

Emsi, 2022

29,737

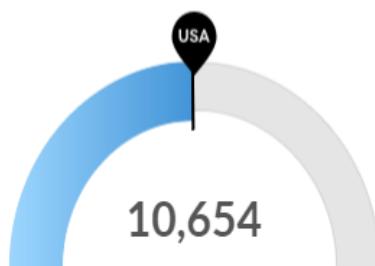


Median Household Income

2018 5-year ACS

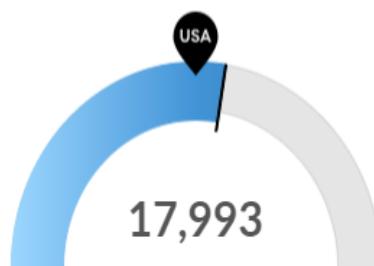
\$113,175

Figure 49: Resident Composition



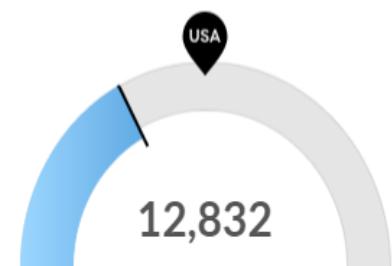
Millennials

Your area has 10,654 millennials (ages 25-39). The national average for an area this size is 10,769.



Retiring Soon

Retirement risk is high in your area. The national average for an area this size is 15,553 people 55 or older, while there are 17,993 here.



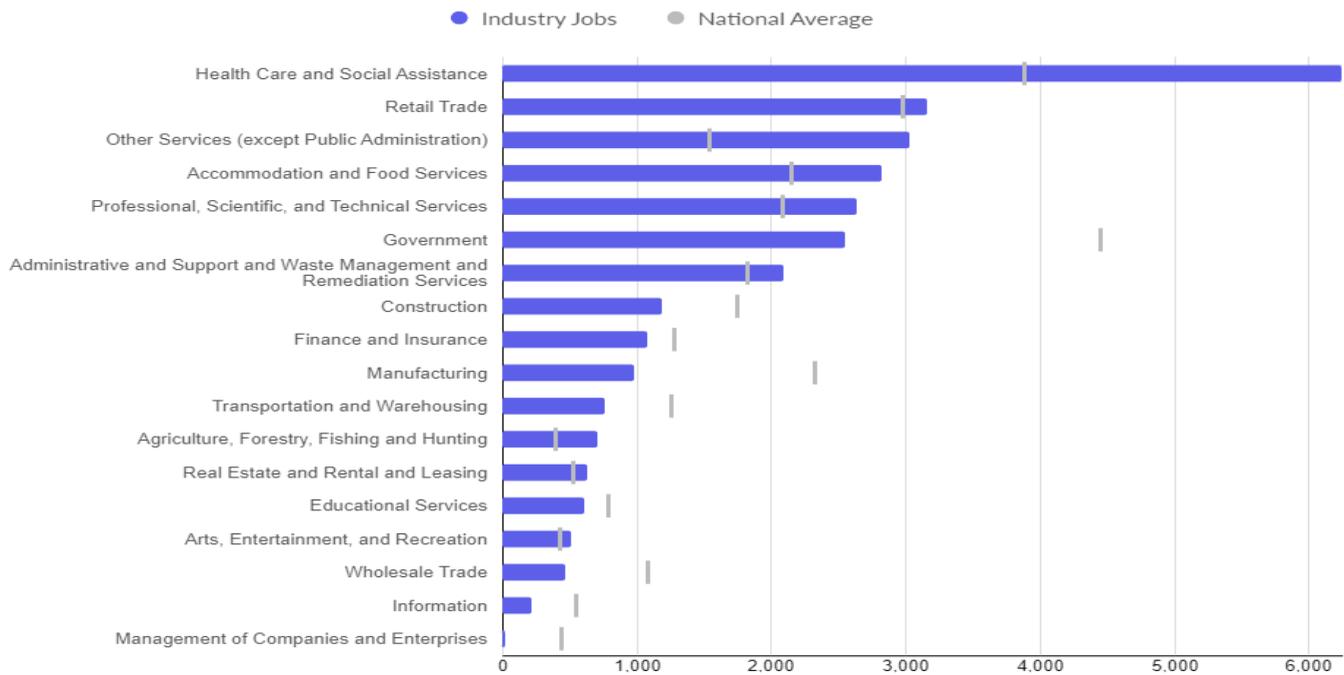
Racial Diversity

Racial diversity is low in your area. The national average for an area this size is 21,048 racially diverse people, while there are 12,832 here.

EMSI, 2022

Figure 50: Largest Industries in Encinitas

Largest Industries



EMSI, 2022



2021 Housing Units

CA Department of Finance, E5 Estimates

26,760



Bachelor's Degree Attainment

2019 1-year ACS

61%

Adults 25 years or older



Average Travel Time to Work

2018 5-year ACS

25.2

Minutes

Escondido



2021 Population

CA Department of Finance, E5 Estimates

151,688



2022 Employment

Emsi, 2022

70,978

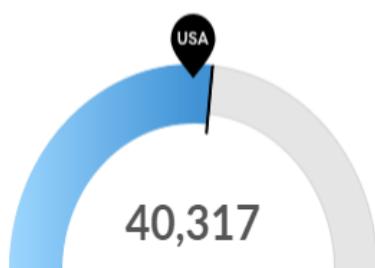


Median Household Income

2018 5-year ACS

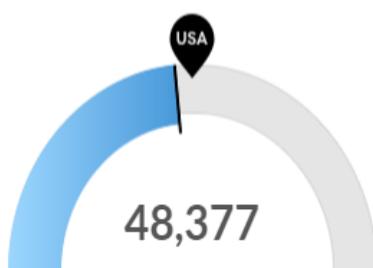
\$62,319

Figure 51: Resident Composition



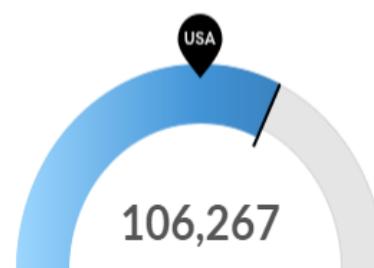
Millennials

Your area has 40,317 millennials (ages 25-39). The national average for an area this size is 36,685.



Retiring Soon

Retirement risk is about average in your area. The national average for an area this size is 52,984 people 55 or older, while there are 48,377 here.



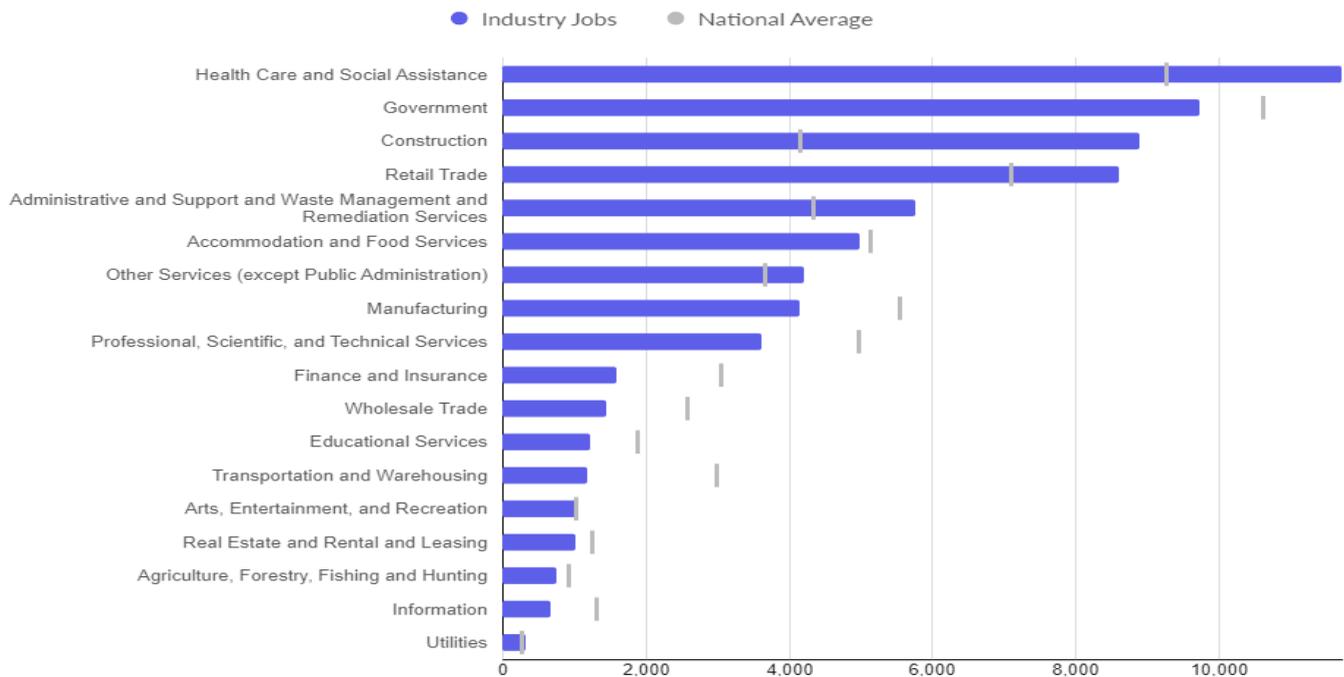
Racial Diversity

Racial diversity is high in your area. The national average for an area this size is 71,704 racially diverse people, while there are 106,267 here.

EMSI, 2022

Figure 52: Largest Industries in Escondido

Largest Industries



EMSI, 2022



2021 Housing Units

CA Department of Finance, E5 Estimates

49,386



Bachelor's Degree Attainment

2019 1-year ACS

26.9%

Adults 25 years or older



Average Travel Time to Work

2018 5-year ACS

27.5

Minutes

Oceanside



2021 Population

CA Department of Finance, E5 Estimates

176,754



2022 Employment

Emsi, 2022

76,374

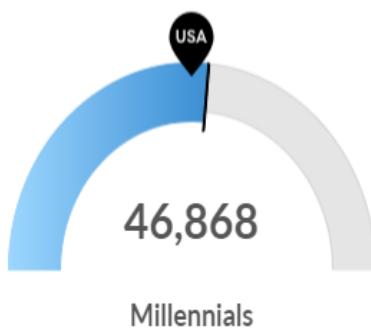


Median Household Income

2018 5-year ACS

\$87,744

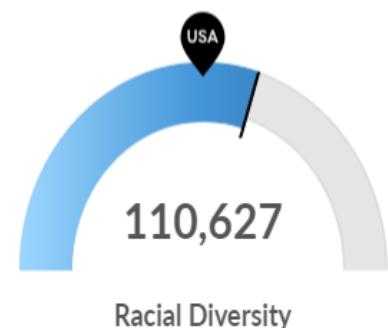
Figure 53: Resident Composition



Your area has 46,868 millennials (ages 25-39). The national average for an area this size is 43,060.



Retirement risk is low in your area. The national average for an area this size is 62,190 people 55 or older, while there are 54,095 here.

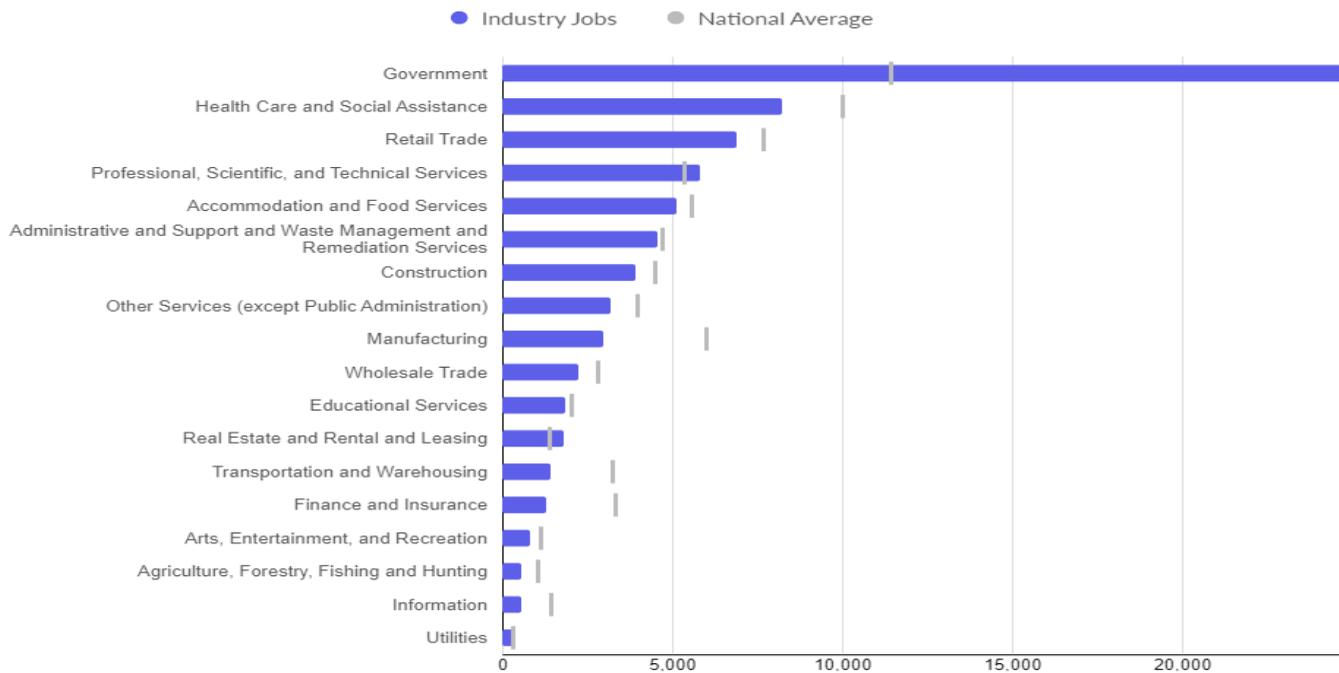


Racial diversity is high in your area. The national average for an area this size is 84,163 racially diverse people, while there are 110,627 here.

EMSI, 2022

Figure 54: Largest Industries in Oceanside

Largest Industries



EMSI, 2022



2021 Housing Units

CA Department of Finance, E5 Estimates

66,283



Bachelor's Degree Attainment

2019 1-year ACS

30.1%

Adults 25 years or older



Average Travel Time to Work

2018 5-year ACS

29

Minutes

Poway



2021 Population

CA Department of Finance, E5 Estimates

48,936



2022 Employment

Emsi, 2022

32,673

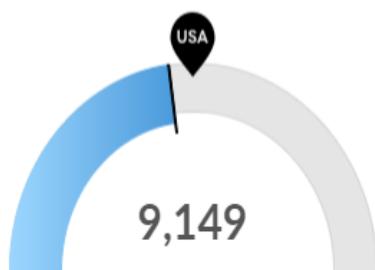


Median Household Income

2018 5-year ACS

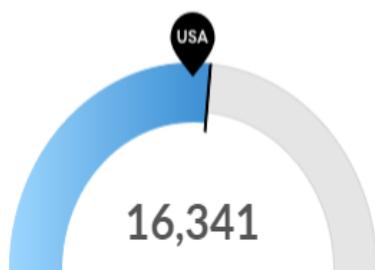
\$105,732

Figure 55: Resident Composition



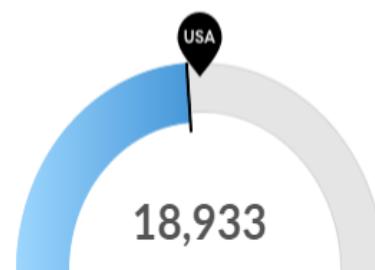
Millennials

Your area has 9,149 millennials (ages 25-39). The national average for an area this size is 10,374.



Retiring Soon

Retirement risk is about average in your area. The national average for an area this size is 14,982 people 55 or older, while there are 16,341 here.



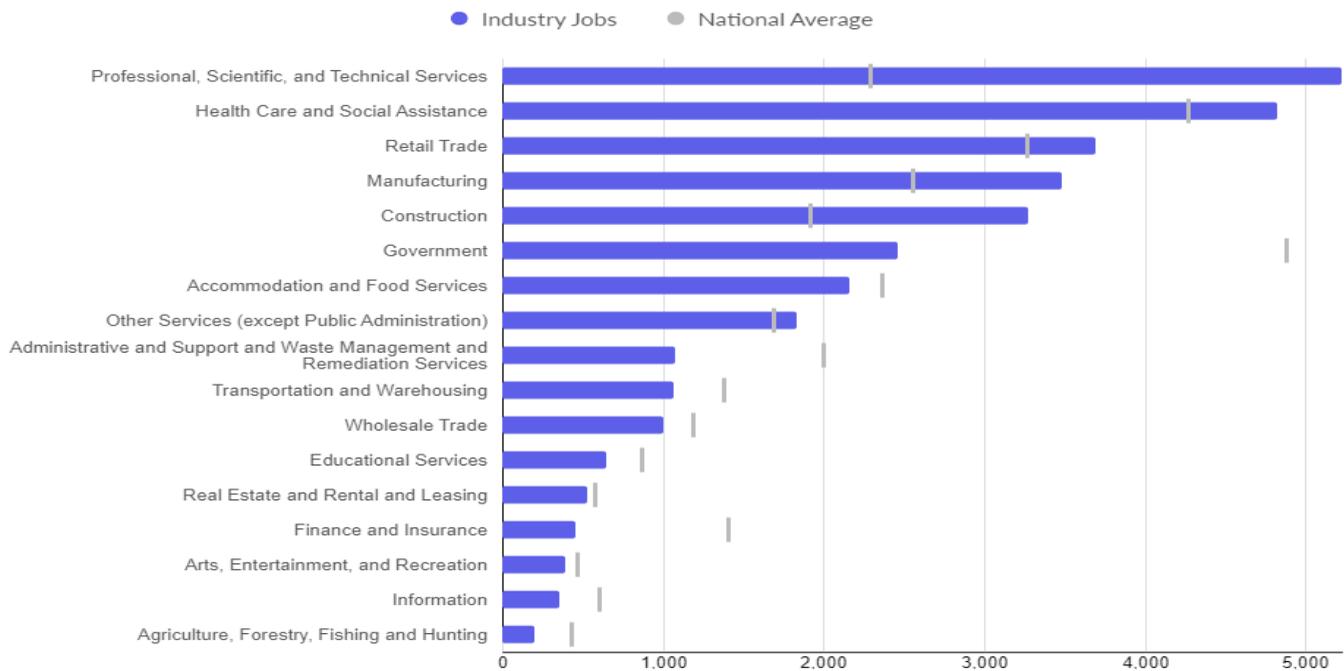
Racial Diversity

Racial diversity is about average in your area. The national average for an area this size is 20,276 racially diverse people, while there are 18,933 here.

EMSI, 2022

Figure 56: Largest Industries in Poway

Largest Industries



EMSI, 2022



2021 Housing Units

CA Department of Finance, E5 Estimates

16,949



Bachelor's Degree Attainment

2019 1-year ACS

47.8%

Adults 25 years or older



Average Travel Time to Work

2018 5-year ACS

25.7

Minutes

San Marcos



2021 Population

CA Department of Finance, E5 Estimates

96,302



2022 Employment

Emsi, 2022

47,055

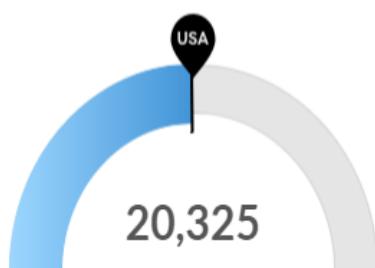


Median Household Income

2018 5-year ACS

\$76,619

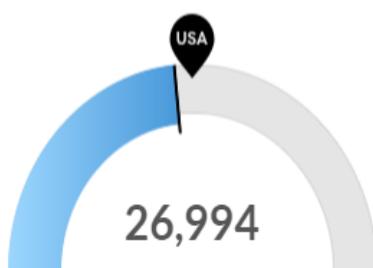
Figure 57: Resident Composition



20,325

Millennials

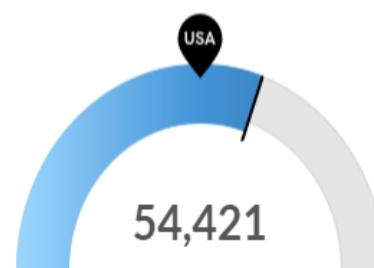
Your area has 20,325 millennials (ages 25-39). The national average for an area this size is 20,515.



26,994

Retiring Soon

Retirement risk is about average in your area. The national average for an area this size is 29,629 people 55 or older, while there are 26,994 here.



54,421

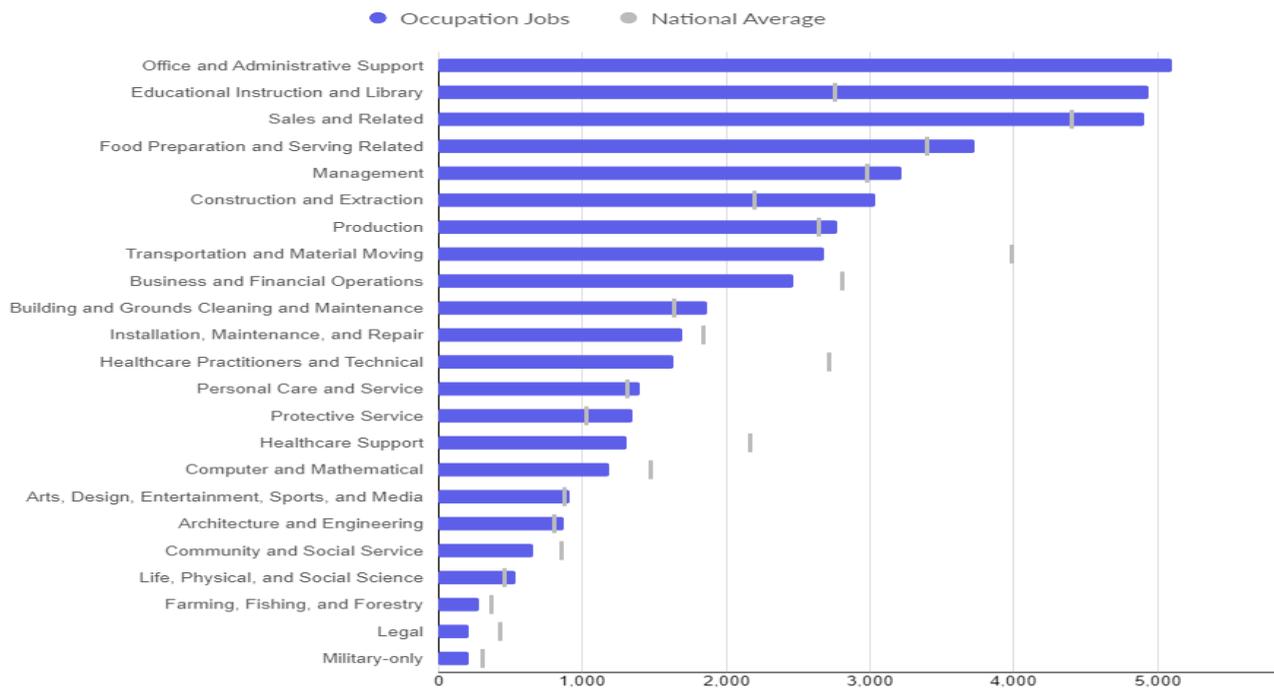
Racial Diversity

Racial diversity is high in your area. The national average for an area this size is 40,098 racially diverse people, while there are 54,421 here.

EMSI, 2022

Figure 58: Largest Industries in San Marcos

Largest Occupations



EMSI, 2022



2021 Housing Units

CA Department of Finance, E5 Estimates

32,700



Bachelor's Degree Attainment

2019 1-year ACS

39.9%

Adults 25 years or older



Average Travel Time to Work

2018 5-year ACS

26.1

Minutes

Solana Beach



2021 Population

CA Department of Finance, E5 Estimates

13,827



2022 Employment

Emsi, 2022

10,283

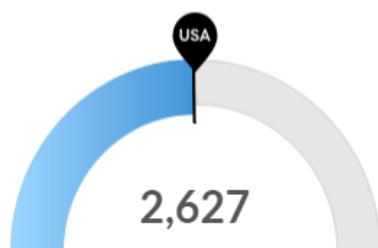


Median Household Income

2018 5-year ACS

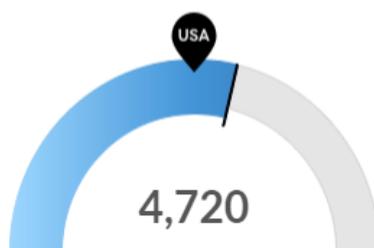
\$105,821

Figure 59: Resident Composition



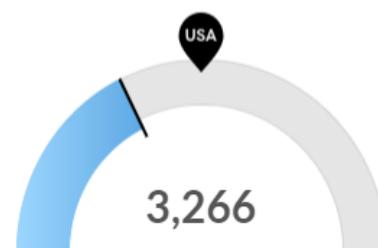
Millennials

Solana Beach, CA (in San Diego county) (ZIP 92075) has 2,627 millennials (ages 25-39). The national average for an area this size is 2,651.



Retiring Soon

Retirement risk is high in Solana Beach, CA (in San Diego county) (ZIP 92075). The national average for an area this size is 3,828 people 55 or older, while there are 4,720 here.



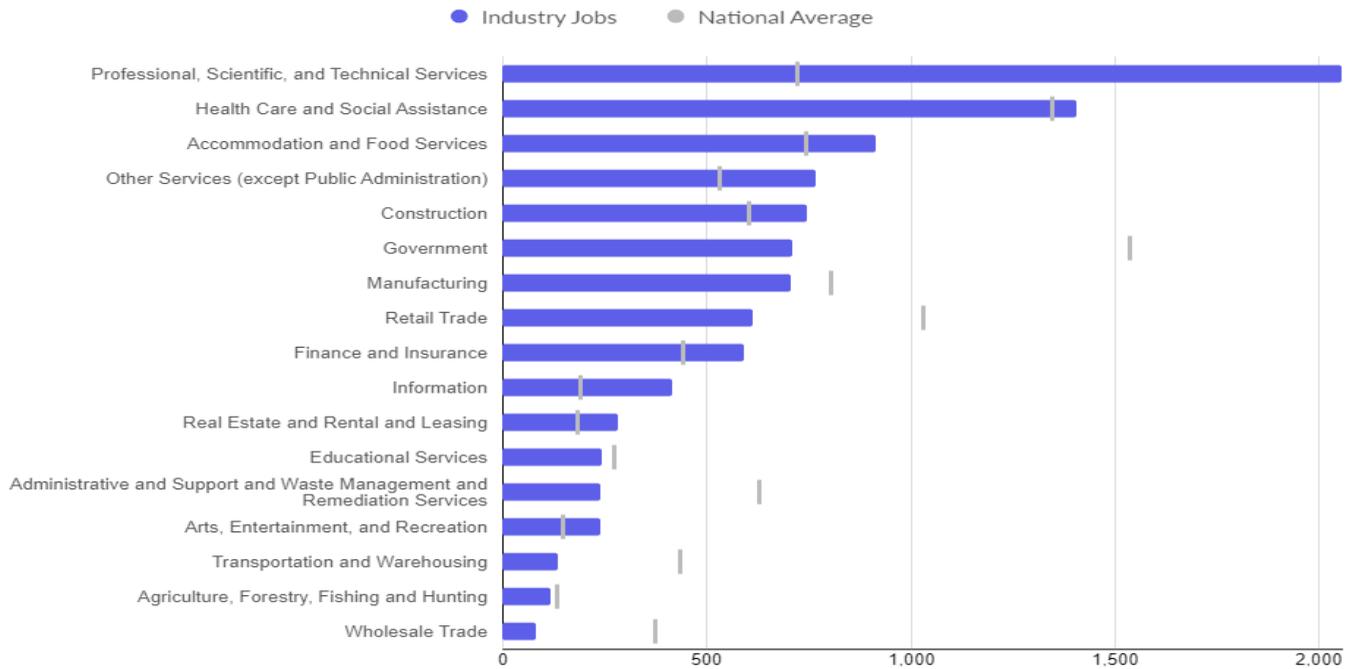
Racial Diversity

Racial diversity is low in Solana Beach, CA (in San Diego county) (ZIP 92075). The national average for an area this size is 5,181 racially diverse people, while there are 3,266 here.

EMSI, 2022

Figure 60: Largest Industries in Solana Beach

Largest Industries



EMSI, 2022



2021 Housing Units

CA Department of Finance, E5 Estimates

6,601



Bachelor's Degree Attainment

2019 1-year ACS

65.1%

Adults 25 years or older



Average Travel Time to Work

2018 5-year ACS

23

Minutes

Vista



2021 Population

*Vista State of the City Brochure**

98,381



2022 Employment

Emsi, 2022

46,993

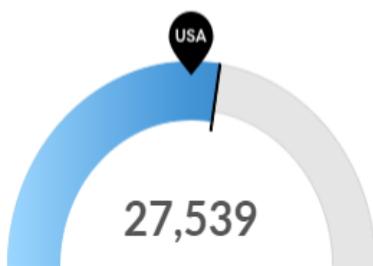


Median Household Income

2018 5-year ACS

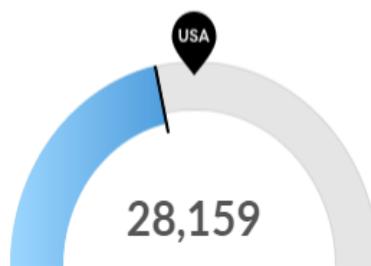
\$65,696

Figure 61: Resident Composition



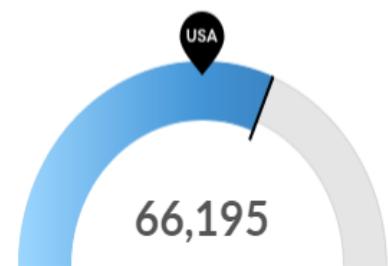
Millennials

Your area has 27,539 millennials (ages 25-39). The national average for an area this size is 23,925.



Retiring Soon

Retirement risk is low in your area. The national average for an area this size is 34,555 people 55 or older, while there are 28,159 here.



Racial Diversity

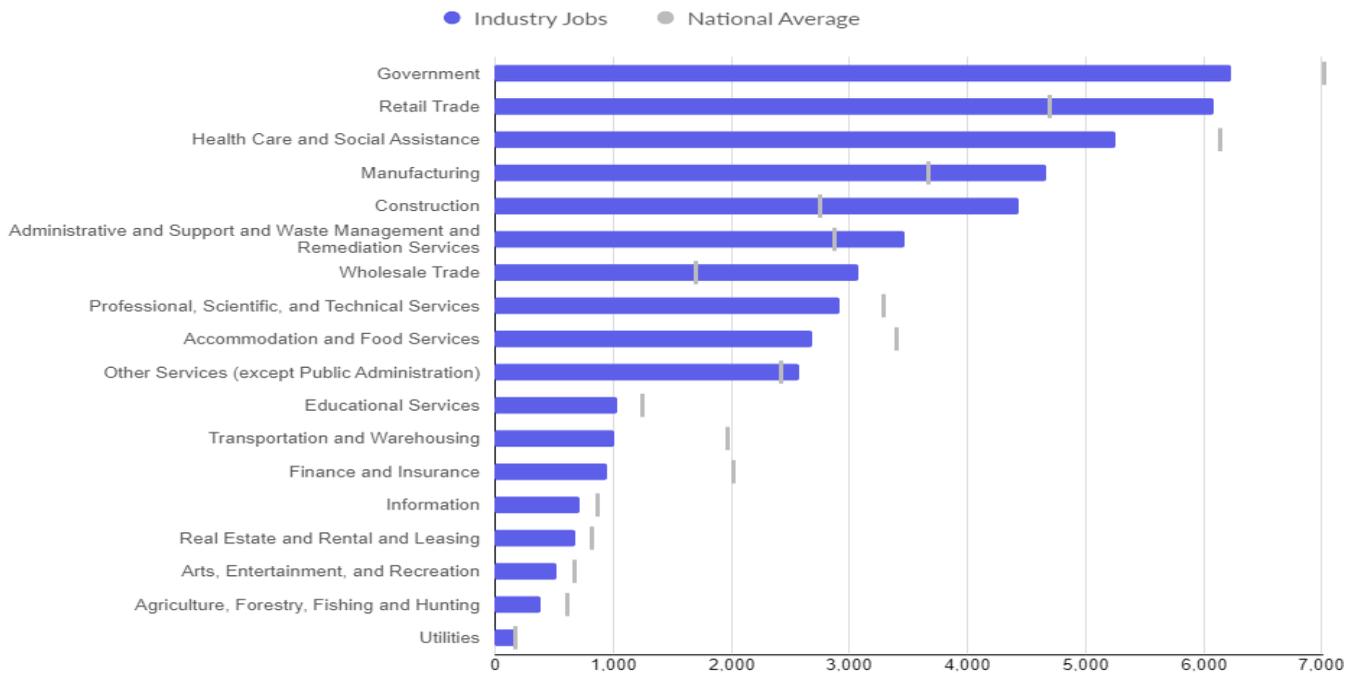
Racial diversity is high in your area. The national average for an area this size is 46,763 racially diverse people, while there are 66,195 here.

EMSI, 2022

**Source varies per City of Vista request*

Figure 62: Largest Industries in Vista

Largest Industries



EMSI, 2022



2021 Housing Units

CA Department of Finance, E5 Estimates

33,311



Bachelor's Degree Attainment

2019 1-year ACS

22.4%

Adults 25 years or older



Average Travel Time to Work

2018 5-year ACS

25.8

Minutes

