2023

NORTH COUNTY INDICATORS

SAN DIEGO NORTH
Economic Development Council

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Welcome Leaders! On behalf of Wells Fargo Bank, N.A. ("Wells Fargo") and the San Diego North Economic Development Council ("SDNEDC"), thank you for joining us at the 2023 SDNEDC Economic Summit. We are proud to highlight Wells Fargo's services, accomplishments, and commitment to helping customers and communities through economic uncertainty.

After navigating extraordinary challenges through a global pandemic, we continue to face economic headwinds. It's in this environment we gather, anchored in our organizations' respective values, and confident in our ability to rapidly adapt services and support for our customers and communities. The ideas we'll share make this year's Economic Summit one you really can't miss!

Through recent and historic market conditions, Wells Fargo has been with you to help meet short and long-term goals. We are a financial services company that proudly serves one in three U.S. households and more than 10% of small businesses in the U.S., and we are a leading middle market banking provider in the U.S. We provide a diversified set of banking, investment, and mortgage products and services, as well as consumer, small business, and commercial finance, through our four reportable operating segments: Consumer Banking and Lending, Commercial Banking, Corporate and Investment Banking, and Wealth & Investment Management. In the communities we serve, the company focuses its social impact on building a sustainable, inclusive future for all by supporting housing affordability, small business growth, financial health, and a low-carbon economy.

In 2022, Wells Fargo's philanthropic giving totaled $4.4 million for San Diego County, California, in support of housing, small business, financial health, sustainability, and more. In addition, the Company contributed to an inclusive economic recovery for small businesses impacted by the pandemic through its roughly $420 million Open for Business Fund, including grants to local organizations.

Across San Diego we've made impacts large and small. Last year a $7.5 million grant from the Wells Fargo Foundation was awarded to the San Diego Housing Commission (SDHC), part of the San Diego Homeownership Equity Collaborative, as part of an expanded effort to help more people of color in the San Diego region become homeowners. The grant is a multiyear initiative from 2022-2025. An example of a smaller but no less important scale, a family-owned ramen restaurant in Carlsbad received industry specific small business support services provided by a grant from the Wells Fargo Foundation to the California Restaurant Foundation's Resilience Fund. Our employees also volunteered over 5,700 hours in San Diego County communities where they live and work. These are just a few recent examples of impacts we've made in the region through relationships we maintain and deepen, some of which we've grown for decades or more.

No matter the size or stage of your business, or the industry or segment of the community you serve, like you, Wells Fargo recognizes our biggest opportunity is in the value we bring to our customers' lives when we engage with them and grow those relationships more deeply. I'm proud we're all focused on delivering more of what our customers and communities want, need, and expect, while we keep our

sights on the future and find ways to grow and evolve together.

It is an honor to sponsor this year's conference and be a part of such an important event. As we continue to navigate 2023, let's rededicate ourselves to thriving together in any economic landscape. Thank you for being members of the SDNEDC and for attending this year's conference!

Joseph Mishriki is the Branch Banking Region Director for the San Diego Region. His region consists of 86 branch locations, leading over 900 employees in San Diego County and the Imperial Valley. He is active in the community and currently serves on the board of directors for California State University, San Marcos.

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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 tenth iteration of the NCI. The 2023 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. Changes, Challenges & Opportunities, on pages 3-8, examines the key issues facing the region and offers insight into how the region could respond.

2. 2023 North County Indicators, on pages 10-40, are split into five categories – People, Economy, Innovation, Education, and Place. These five categories provide quantitative measures of North County and allow regional stakeholders to delve deeply into a component of economic vitality.

3. Quick Facts: Pages 41–50, 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, and North City.

This report was made possible by a generous grant from San Diego County Board of Supervisors Vice Chair, Terra Lawson-Remer.

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This report was designed by Sofia Ayad.

Changes, Challenges & Opportunities for North County

1 North County's Transition to a Decarbonized Economy

Like other regions across the country and around the world, North County is trying to understand and plan around a decarbonized economy. The transition to a decarbonized economy will not be simple or easy, but volatile gas prices, reduced expenses of renewable energy, and growing costs and concerns around climate change have already provided a catalyst for new investments and planning. From an economic and employment perspective, this transition will have a sizable impact on jobs and employment opportunities in transportation, buildings, electricity and fuels. Recent research from New York[1] and Illinois[2] has demonstrated the ample employment opportunities and potential challenges associated with different decarbonization transition scenarios. Both studies demonstrate that the sectors most affected by the shift to a decarbonized economy will experience a significant increase in overall employment by 2030.

How is North County planning and preparing for the transition to a decarbonized economy? The following issues and questions will need to be addressed as North County considers decarbonization.

Specific Challenges & Opportunities for North County

A. What infrastructure investments will North County make in electricity, transportation, fuels, and buildings to create its decarbonization pathway? Federal and statewide legislation, like the Inflation Reduction Act (IRA), provide considerable resources to invest in the infrastructure needed to transition to a decarbonized economy. The pathways or scenarios to decarbonization need to be identified and developed so North County can determine which

[1] https://www.documentcloud.org/documents/21830507-jtwg-jobs-report
[2] https://www.bwresearch.com/docs/BW_ComED-Jobs&EquitableEnergyTransitionStudyReport2022.pdf

scenarios offer the most benefit to the region and how to best prepare for this transition.

B. How can we best support North County businesses that are already providing solutions for our decarbonization pathway? North County is home to companies that already play a key role in decarbonization. Firms provide innovative solutions for energy storage, alternative vehicles, renewable energy, and energy efficiency. As California and the rest of the country move to a decarbonized economy, North County businesses like EDF Renewable Energy, GKN Hydrogen, and Aptera are prepared to play a valuable role in this transition. California will continue to invest in offshore wind, hydrogen, and the electrical grid for the next 20 years. North County should continue to build upon the region's clean technology providers and create a supply chain for the infrastructure investments needed for the decarbonization transition.

C. Will North County have the workers needed to support the transition to a decarbonized economy? Increasing access to and availability of technical programs and transition pathways to current occupations (such as Electricians, Welders, or Assemblers) to obtain technology-specific skills should be developed for these clean energy industries. This requires building an educational pipeline for current workers that can potentially transition them into these new clean energy opportunities that require certifications and technology-specific skills. It will also require educating current students and potential workers about the employment opportunities in these burgeoning industries.

2 Artificial Intelligence and Machine Learning

Artificial intelligence (AI) and machine learning (ML) have the potential to be greater disruptors to the economy than the Internet. While the conversation around the size and scope of that disruption will not be determined soon, we can still consider the role of these technologies on North County's economic ecosystem. These emerging technologies are not only driving the North County businesses directly involved in developing AI solutions, but they are also increasingly becoming an enabling technology for firms that provide cybersecurity, supply chain management, and healthcare solutions.

A recent study[3] examining San Diego County's Artificial Intelligence and Machine Learning businesses revealed a strong connection with cybersecurity and the region's defense and military contractors. It also showed a talent shortage since businesses engaged in artificial intelligence, machine learning, and cybersecurity are hiring more workers. In North County, firms like Always AI, Everstream Analytics, and Opel Labs are using these emerging technologies to protect data, assess supply chains, and help test and produce new products.

[3] https://www.sandiegobusiness.org/blog/study-release-ai-and-san-diegos-cyber-cluster/

The following issues and ideas were identified as North County examines the role that emerging technologies, like Artificial Intelligence and Machine Learning, could have on the region's innovation ecosystem.

Specific Challenges & Opportunities for North County

A. Talent, quality of life, and a robust and diverse industry mix in North County combine to create an attractive location for AI and Machine Learning firms. North County professionals' strong educational attainment and the region's proximity to top talent and STEM students give it an advantage in building its technology industries around Artificial Intelligence and Machine Learning. The main challenge to North County is ensuring that the educational pipeline can supply current and potential businesses with enough qualified workers and a good environment to ensure that these businesses stay in the region. These industries have specific talent requirements that aren't solved by simply growing the overall regional population or increasing the number of primary working-age individuals. Instead, North County needs to focus on improving the labor market fluidity among residents, providing an environment that attracts talent by providing adequate housing, creating access to living within the region, and finding ways of bringing in talent – domestically and internationally – to the region.

B. Align opportunities in these new technologies with educational pathways in local colleges and educational institutions. Although applications, enrollment, and selectivity in California 4-year universities keeps increasing, the career pathways for moving towards opportunities in AI, ML, cybersecurity, and other high-growth industries need to be clearer and more available to younger cohorts. In the coming years, expanding access to technical schools and community colleges that focus on these industry opportunities and ensuring easy transferability to nearby 4-year universities is key for building a North County workforce around AI and ML opportunities. Unlocking new job opportunities in the current tight labor market needs to go hand-in-hand with a local student body aware of their opportunities and professional future in the region upon graduation. This means working with community colleges in North County, such as Palomar and MiraCosta, to increase students' awareness of career pathways and improve the transition from community college or technical programs directly into the workforce.

3 Evolving Supply Chains

Supply chain disruptions began during the pandemic, but the war in Ukraine and a growing decoupling of the global economy[4] have continued to challenge and bring uncertainty to North County's concentration of globally-connected manufacturers and their supply network. A recent publication by the Federal Reserve Bank

[4] https://www.brookings.edu/bpea-articles/is-the-global-economy-deglobalizing-and-if-so-why-and-what-is-next/

of Richmond stated, "There is no precedent in recent history for the supply chain disruptions that currently afflict the global economy."[5] These supply chain disruptions pose both a challenge for North County manufacturers and an opportunity for the region's entrepreneurs and businesses that could potentially reinvigorate these supply networks with regional options.

North County's concentration of manufacturing employment is 50 percent higher than San Diego County or the entire state of California. The largest manufacturing employers in North County are found in the following industries:

- Aerospace & aircraft manufacturing
- Communication & broadcasting equipment manufacturing
- Electromedical device & medical instrument manufacturing
- Search and guidance systems & instrument manufacturing
- Life sciences including pharmaceuticals preparation manufacturing
- Semiconductors & related manufacturing

Each of these industries employ over 1,700 people in North County, with average annual wages above $120,000. These manufacturers are all connected to complex supply chains that produce high-value products and have large employment multipliers for the region.

Specific Challenges & Opportunities for North County

A. Identify, catalog, and examine the supply chains that are most relevant to North County. The list above identifying the largest manufacturing industries in North County is a good starting point to assess which supply chains could be supported and developed. Additional work must be done to understand the needs of North County manufacturers; determine if they want to expand and/or improve their supply network; and identify specific goods they are interested in sourcing locally. On the other side of the equation, additional analysis is needed to determine if the skills, resources, and ability to support these supply chains are available within North County.

B. Partner with neighboring regions to increase connectivity within the Southern California mega-region.[6] North County should work with neighboring regions to develop a robust understanding and database of the relevant supply chain collaborators accessible to technology and industry within the larger mega-region. These supply chain networks will grow more resilient and effective if they can partner quickly with collaborators from surrounding areas.

[5] https://www.richmondfed.org/publications/research/econ_focus/2022/q3_feature2

[6] The Southern-California mega region has been defined to include North-Western Baja California (Mexico), as far east as Las Vegas, and as far north as Santa Barbara County.

C. Support businesses that are working to enter these supply chains. The Bipartisan Chips Act federal legislation that includes $39 billion in subsidies to reinvigorate semiconductor chips and their supporting supply chain is an attempt by the federal government to regrow an important supply chain within the United States. We are not advocating for large subsidies for the support of specific supply chains, but there is value in developing regional plans and strategies to diminish the barriers of building, growing, and hiring for businesses interested in moving into these regionally relevant supply chains.

4 Economic Distress in North County

As a whole, North County continues to be a largely healthy economic region. The region enjoys a high median household income, approximately 25 percent higher than California's and 50 percent higher than the nation's. North County residents are also 25 percent more likely to have a four-year college degree (or higher) than California residents and 30 percent more likely than US residents as a whole. However, these regional measures continue to hide pockets of economic distress in smaller North County communities.

Building upon the work done in last year's North County Indicators (2022), we identified the communities by ZIP Code in the region that indicated at least three measures of economic distress. (Figure 1) These measures of economic distress include a high poverty rate (>10%), a high percentage of residents without health insurance (>10%), a high percentage of adults over 25 years old with a low level of education[7] (>18%), a low median annual household income (<$65,000), and 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 in their ZIP Code and demonstrate at least three measures of economic distress:

- 5 measures of economic distress: 92054 (Oceanside) and 92025 (Escondido)
- 4 measures of economic distress: 92058 (Oceanside) and 92027 (Escondido)
- 3 measures of economic distress: 92084 (Vista), 92083 (Vista), and 92003 (Bonsall)

92003 (Bonsall) was added to this list for the 2023 NCI.

The following communities have less than 5,000 residents in their ZIP Code and demonstrate at least three measures of economic distress:

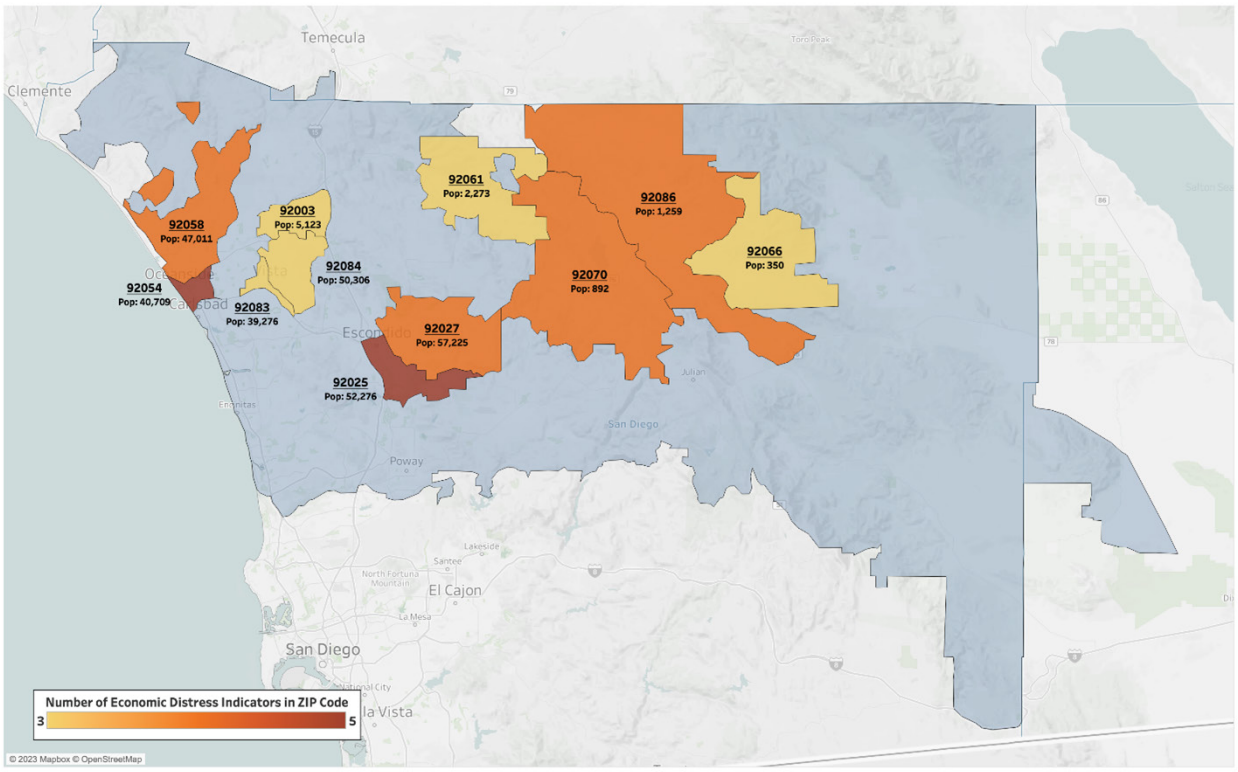
- 4 measures of economic distress: 92070 (Santa Ysabel) and 92086 (Warner Springs)
- 3 measures of economic distress: 92061 (Pala) and 92066 (Ranchita)

92066 (Ranchita) was added to this list for the 2023 NCI.

92004 (Borrego Springs) and 92059 (Pala) were removed from this list for the 2023 NCI.

[7] Defined as adults over 25 years with less than a High School Degree or equivalency as their highest level of educaiton.

Figure 1: Economic Distress in North County



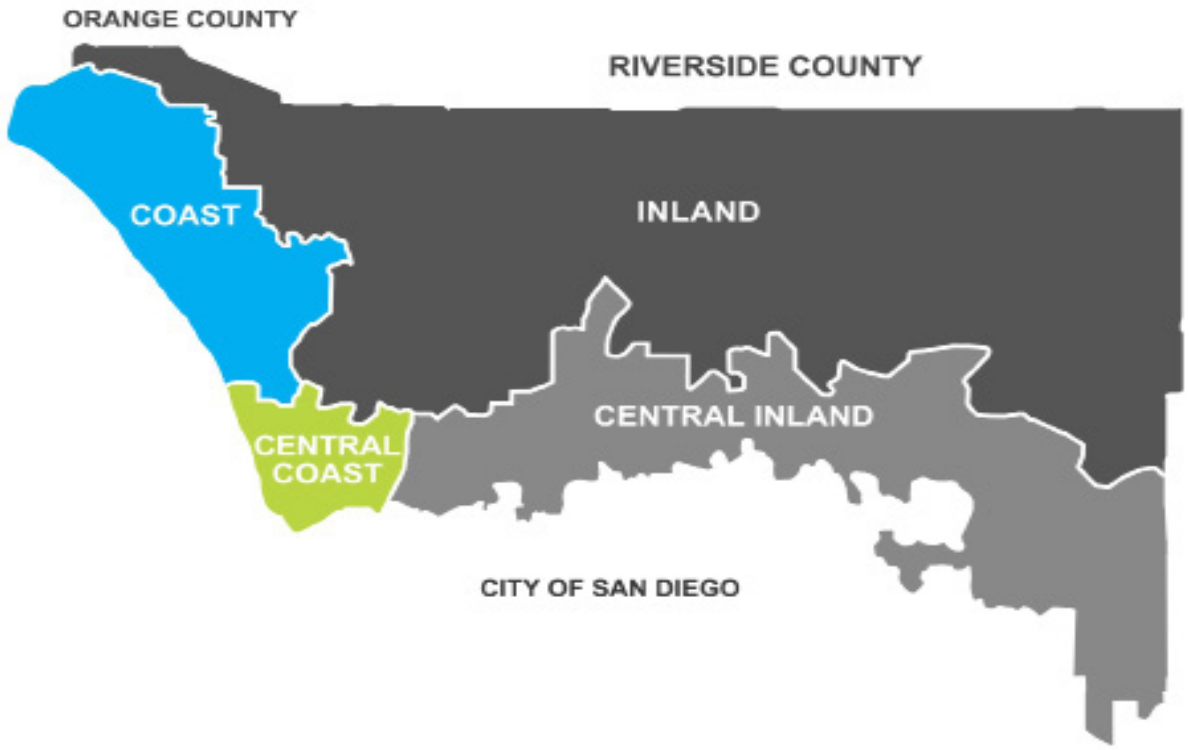
The following strategies should be considered as we look to improve the economically distressed communities in North County.

1. Look for opportunities to invest in the North County's distressed communities. Examples include building or renovating public infrastructure, developing parks and other quality of life amenities, or developing libraries or community centers. North County's distressed communities would benefit from additional public sector investments.

2. Identify and communicate with organizations in North County that can assist and support households in these distressed communities. Communicate with North County's philanthropic and community-based organizations. Make them aware of the challenges and opportunities to assist households in distressed communities. North County's distressed communities would benefit from additional support from the region's philanthropic and community-based organizations.

3. Support local businesses and entrepreneurial activities that are based in North County's distressed communities. Identify and communicate with the businesses and entrepreneurial efforts established or emerging from North County's distressed communities. Encourage businesses and residents to support these entities. North County's distressed communities would benefit from additional patronage from the region's private sector and business community.

San Diego's North County Region



North County's Jurisdictions and Unincorporated Areas

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

* = Zip Codes 92197, 92129, 92128, 92130

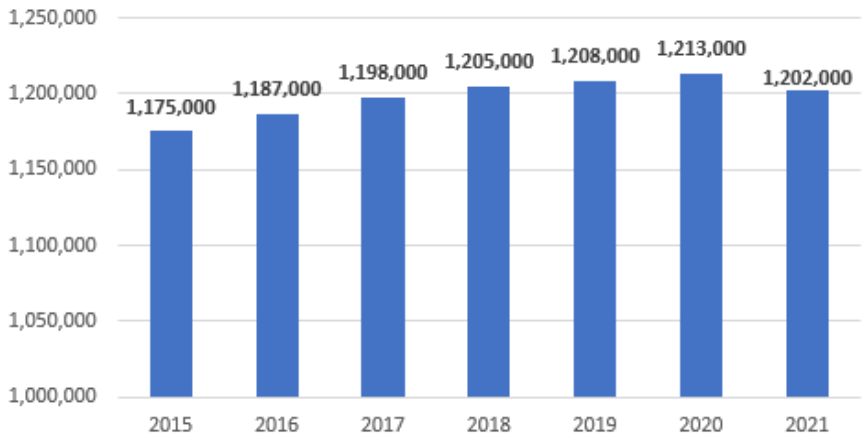
People

A region's ongoing economic vitality depends on the people who live and work there. The indicators in this section help us understand how the evolving population in North County translates into economic advantages, challenges, and opportunities. Please note that the most recent demographic data (from the American Community Survey) is through 2021.

Changing Population

San Diego's North County population reached 1.2 million in 2020, with a slight decline in 2021. This represents about a third of San Diego County's population and is just over 3% of California's residents. [8] North County's population is larger than Westchester County in New York, Montgomery County in Maryland, and Contra Costa County in California. If it was its own city, North County would be the 10th largest in the nation.

Figure 2: Population Change in North County



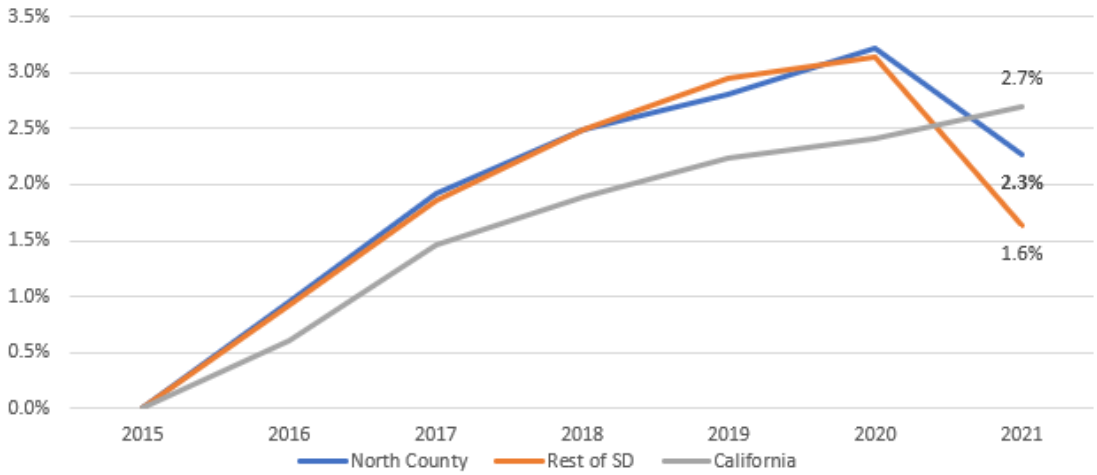
WHY DO THESE INDICATORS MATTER?

Analyzing North County's changing population allows us to better understand the driving forces of change that will ripple through North County. Population demographics provide insights into supply and demand for healthcare, education, local restaurants and shops, training, childcare, and recreation.

[8] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021

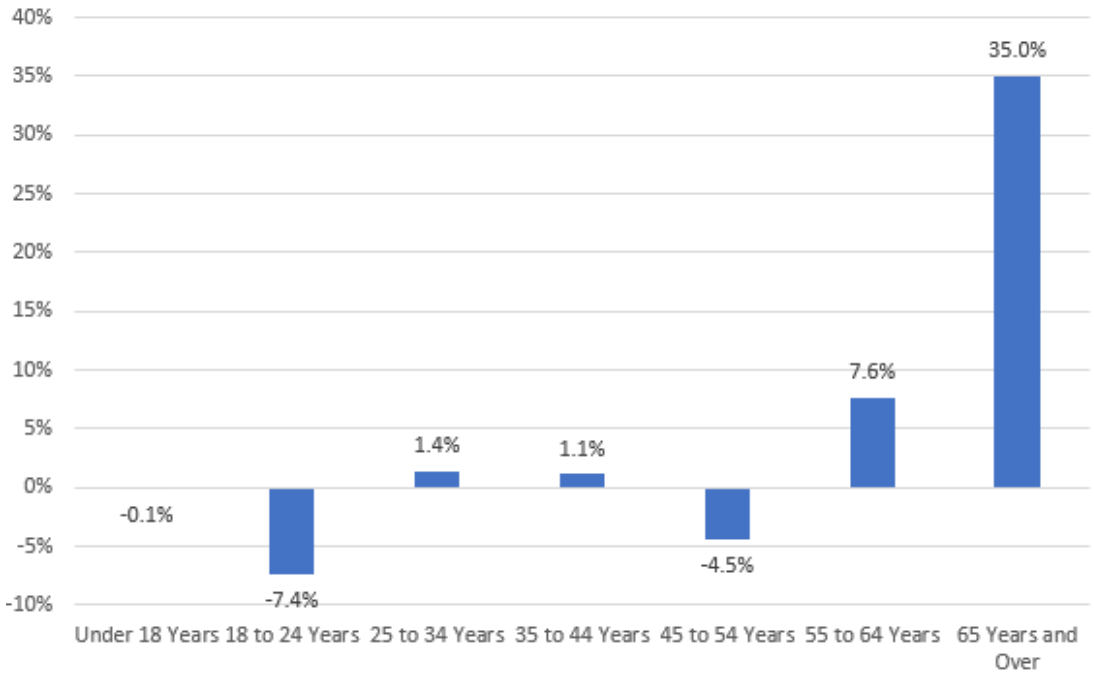
Between 2015 and 2021, North County's population grew by about 2.3% (an additional 27,000 people). This rate of growth is higher than in the rest of San Diego (1.6%), and comparable to neighboring counties such as Orange County (2.1%). However, North County's growth remains slower than the state (2.7%) and national (4.2%) averages. [9]

Figure 3: Population Change - Regional Comparison; 2015-2021 [10]



JobsEQ Q3 2022, ACS, 5-year estimates, 2021

Figure 4: Population Growth by Age Group [11]



JobsEQ Q3 2022, ACS, 5-year estimates, 2021

[9] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021
[10] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021
[11] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021

North County's population is becoming considerably older. The population aged 65 years and over has increased by 35% since 2015, while the population aged 64 and younger decreased by approximately 2%. Most of the population growth in North County is driven by people 55 years old and over, as younger cohorts have either barely increased or have decreased since 2015. [12]

This has profound implications for North County's future economic growth. An older population will create more demand for health care services, specialized housing, and long-term care. In some districts, enrollment in North County schools is likely to plateau and fall. The labor force is unlikely to expand significantly. Talent recruitment and retention will continue to be a key imperative for businesses.

North County has a larger proportion of people who can only speak English than the rest of San Diego, California, and the United States. (Figure 5) North County also has a lower proportion of people reporting they speak English "less than very well" than statewide and neighboring counties' averages. [13]

Figure 5: Language Spoken at Home

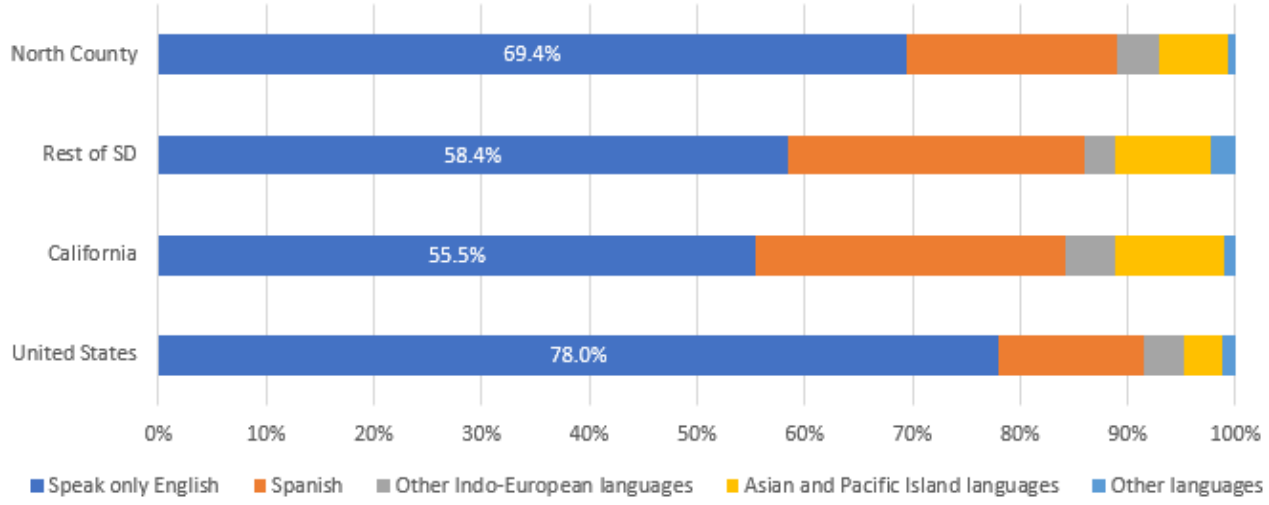


Table 1: Population 5 years and Over that Speaks English Less than Very Well

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

JobsEQ Q3 2022, ACS, 5-year estimates, 2021

North County's population is predominantly White (65%), at a greater rate than statewide and county averages, and comparable to the national average (68%). Its Hispanic population is also smaller than in comparable neighboring counties. [14]

[12] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021
[13] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021
[14] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021

Figure 6: Hispanic Population

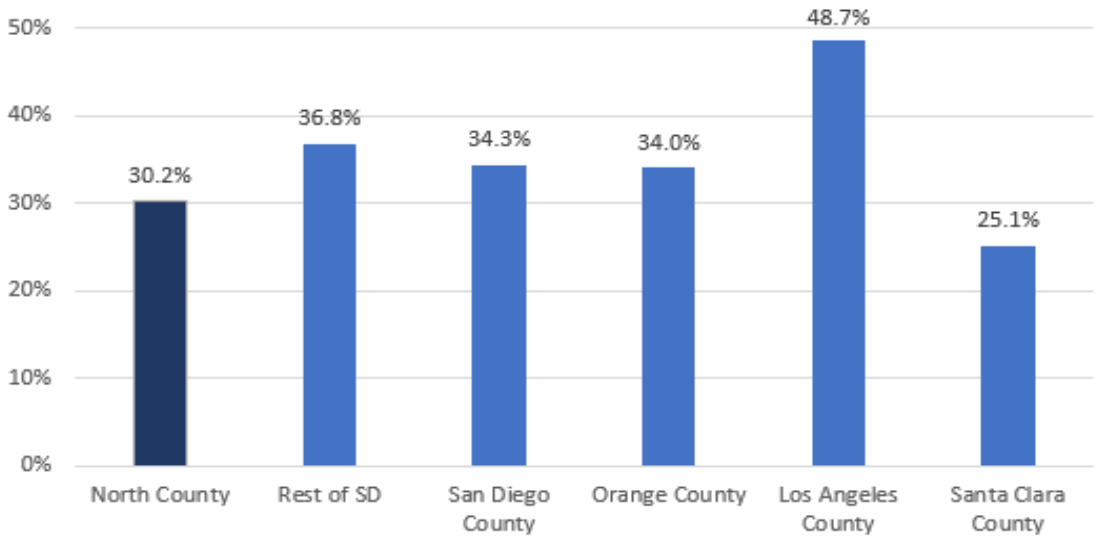
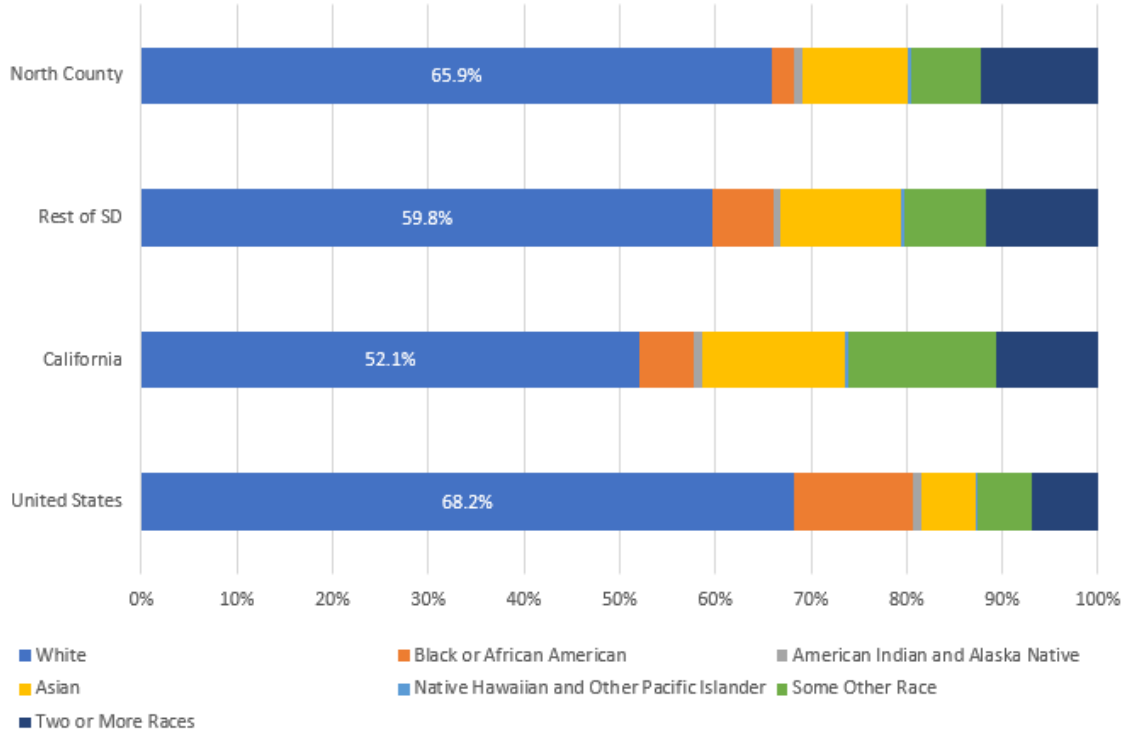


Figure 7: Racial Composition



Healthcare

Less than one-tenth of North County's residents (7.3%) have no health insurance access. North County's population without health insurance is comparable to the statewide average (7.2%) and to neighboring regions such as Orange County (7.1%). [15]

Insurance rates greatly vary by educational attainment. Residents with a bachelor's degree are nine times less likely to be uninsured than residents who have not completed high school. (Table 2, Figure 8 & 9)

Figure 8: Uninsured Rate

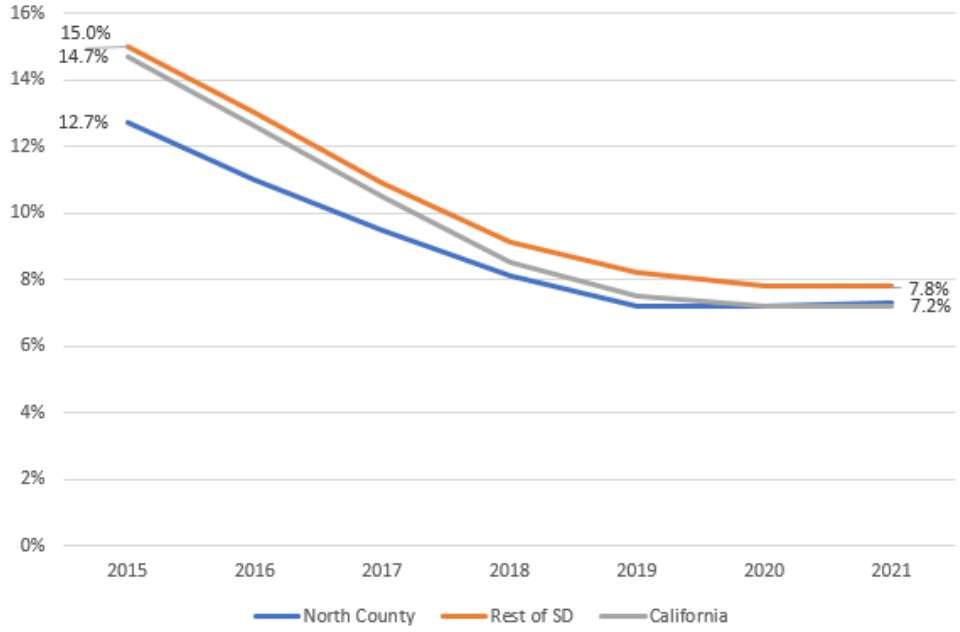
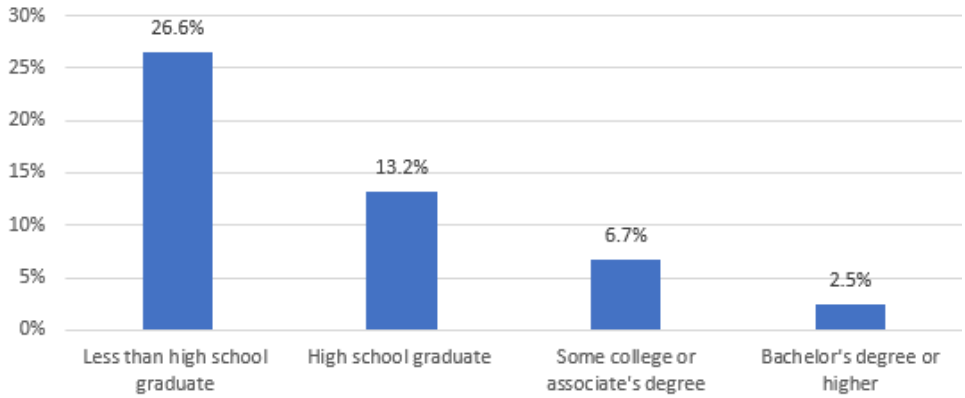


Figure 9: Uninsured Rate by Educational Attainment



[15] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021

Table 2: Uninsured Rate by Region

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%

Workforce & Income

Over 61,000 North County residents leave North County to work every day. Of these workers, nearly 80% work higher-paying jobs in Management, Business, Science, or Art occupations.

Meanwhile, nearly 140,000 commute into North County, and another 359,000 live and work within the North County area. (Figure 10)

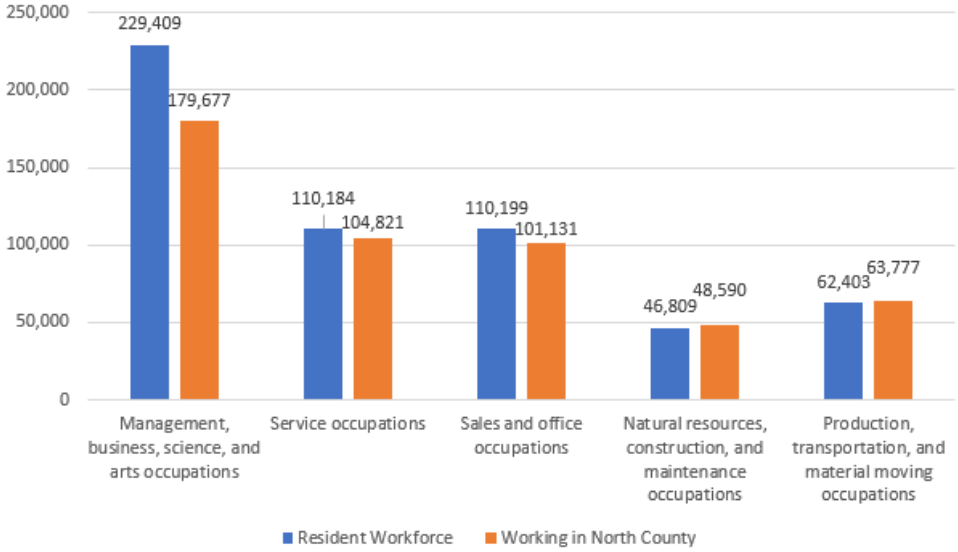
WHY DO THESE INDICATORS MATTER?

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 they hold. This metric is particularly important for North County as it continues to transition towards being an independent and dynamic economy.

Median household incomes ($101,000) are much higher in North County than in other comparable regions. North County's median household income is about $12,000 higher than the rest of San Diego County and almost $25,000 higher than Los Angeles County. Santa Clara County is the only county in the comparable regions presented in the NCI with a higher median household income than North County.

There are several impacts of this high median household income. On the positive side, growth in median household income in North County has created a demand for more varied services and helped support the diversification of the region's retail sector. More affluence leads to greater demand for more varied goods and services. On the other hand, high median household income can drive up the price of basic cost-of-living items (like food, services, and especially housing), stressing household budgets for the region's less affluent households.

Figure 10: Resident Workforce and Working in North County



Although North County has a higher median household income than the rest of San Diego County and California, its growth rate since 2015 has slowed compared to these two areas. Median household income in the rest of San Diego has grown by almost 40% since 2015, while the rate of increase in North County has been only 32% over the same period. (Figures 11 & 12)

North County still has higher median household incomes than the rest of the county, state, and nation in 2022.

Figure 11: Median Household Income Growth

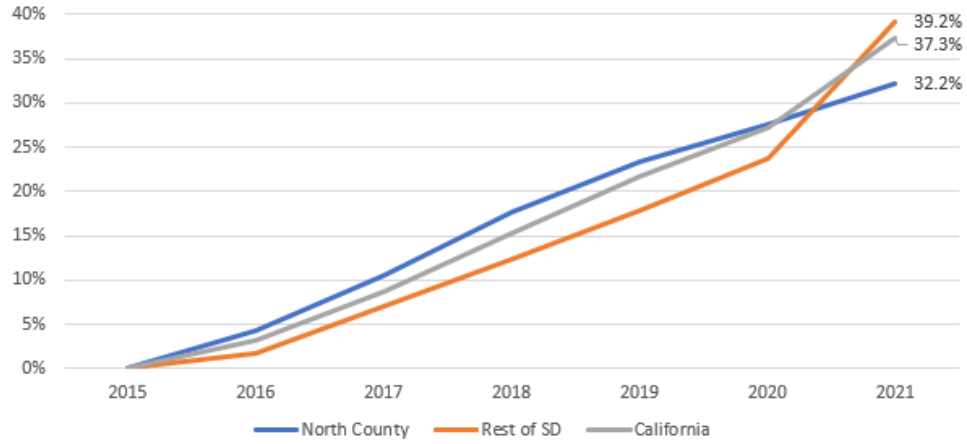
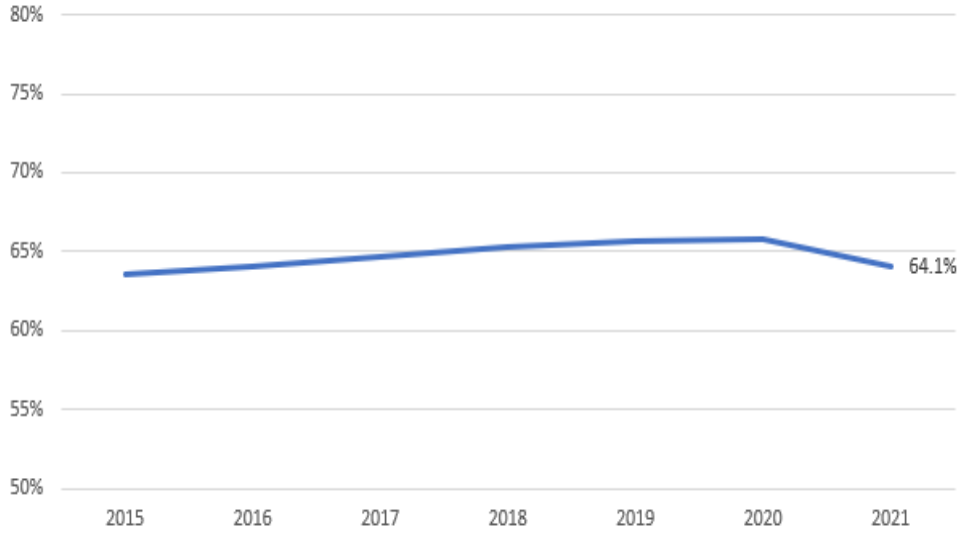


Table 3: Median Annual Household Income by Region

United States	North County	California	San Diego County	Rest of San Diego	Orange County	Los Angeles County	Santa Clara County
$69,717	$101,813	$84,907	$91,003	$89,488	$100,559	$77,456	$141,562

North County's Labor Force Participation Rate (LFPR) suggests that its workforce is still recovering from the pandemic, going from 66% participation rate in 2020 to 64% in 2021. It is important to note that North County's LFPR has not been this low since 2016. (Figure 12)

Figure 12: Growth in Household Income (2015-2020)



Economy

The indicators in this section cover industry clusters, highlighting the intertwining relationships between firms and their supply chains. Analysis of clusters often reveals regional competitive advantages, like the Information and Communication Technology cluster and Biotechnology and Biomedical Devices cluster in North County. Additionally, this section looks at job quality to help understand the kind of jobs North County is creating and which ones pay wages that help families sustain themselves. During times of low unemployment, job quality is especially relevant as factors such as low wages, few benefits, and little opportunity for career advancement provide a more nuanced story about the economic well-being of residents in a region.

Overall Employment

Despite the job losses incurred by the COVID-19 pandemic, 2022 was a year of recovery, growth, and building a more resilient economy. The number of people employed in North County is recovering more slowly than in the rest of San Diego County and California. While the rest of San Diego County and California have fully recouped the jobs lost in 2020 and surpassed their pre-pandemic employment levels, North County is still 2.8% below its 2017 employment levels. (Figure 13)

Figure 13: Employment Growth in North County

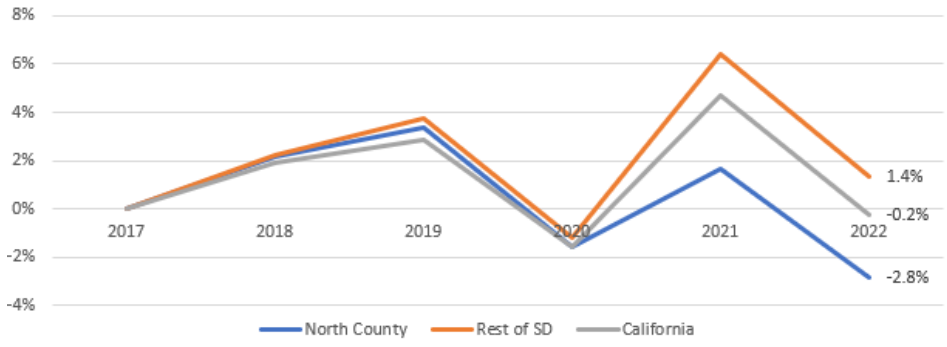


Table 4: Overall Employment and Unemployment Rate by Region (2022)

	2022 Employment	Employment Growth (2021-2022)	Unemployment (2022)
North County	477,105	-4.4%	3.3%
Rest of San Diego County	1,054,510	-4.8%	3.7%
San Diego County	1,532,846	-4.7%	3.3%
Orange County	1,677,750	-4.0%	3.0%
Los Angeles County	4,652,929	-4.3%	4.4%
Santa Clara County	1,122,843	-4.9%	2.0%
California	18,267,056	-4.7%	3.7%

The unemployment rate in San Diego County is lower than many of the surrounding regions and the state of California but is higher than the national unemployment rate. (Table 4)

North County's unemployment rate tracks with the county's overall number. Standing at 3.3% in 2022, North County is close to full employment, with 3 out of 100 individuals in the labor market stating that they are actively looking for work but unemployed. (Table 5)

Table 5: Unemployment Rates in North County Cities

Carlsbad	Del Mar	Encinitas	Escondido	Oceanside	San Marcos	Solana Beach	Vista
3.1%	1.3%	2.7%	3.2%	3.5%	3.2%	1.8%	3.8%

Industry Clusters

Industry clusters are the fundamental unit of analysis used by economic developers and economists to understand and evaluate regional economies. Clusters are closely related industries that often work together in supply chains or through other relationships which create value.

For example, the craft beverage industry in North County comprises not only brewers and distillers but companies which make the packaging for these beverages, specialized machinery to support bottling lines, yeast developers and distributors, farmers, restaurants, and business support organizations like public relations firms and banks.

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.

WHY DO THESE INDICATORS MATTER?

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

Additionally, job quality provides a deeper understanding of what types of employment opportunities exist in North County and the livelihoods that they offer.

Figure 14: High Growth Industry Clusters[16]

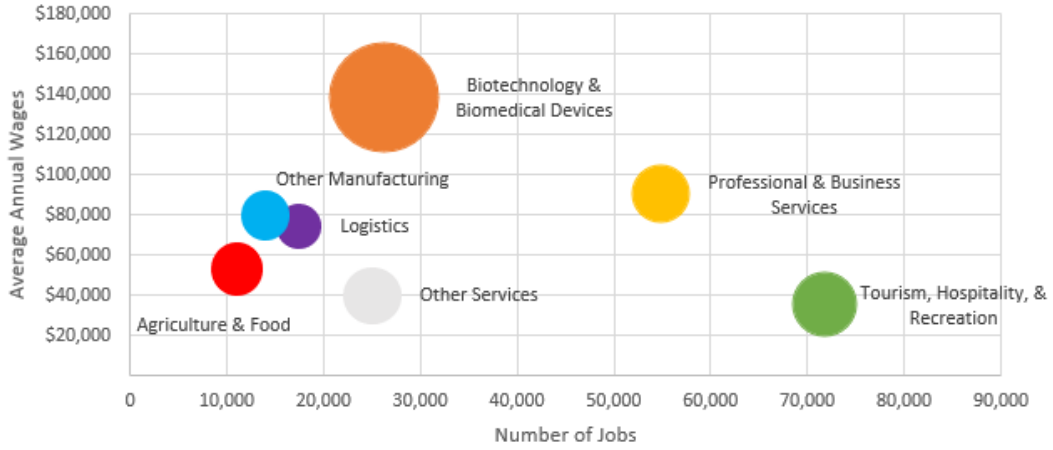


Figure 14 shows high-growth industry clusters that have increased employment since 2021. Biotechnology & Biomedical Devices is one of North County's most solid clusters since it has a high concentration of workers in the region and an average wage above $140,000. This cluster also increased employment by over 30% in the past year. Tourism, Hospitality & Recreation, the cluster with most employment in the region, continued its recovery path from the effects of the pandemic and grew by 13%.[17]

[16] Bubble size represents Location Quotient for these industries. A large bubble shows an industry cluster that has an above national average concentration of workers in North County.
[17] JobsEQ Q3 2022, American Community Survey 2021 5-year estimates.

Figure 15: Slow Growth Industry Clusters [18]

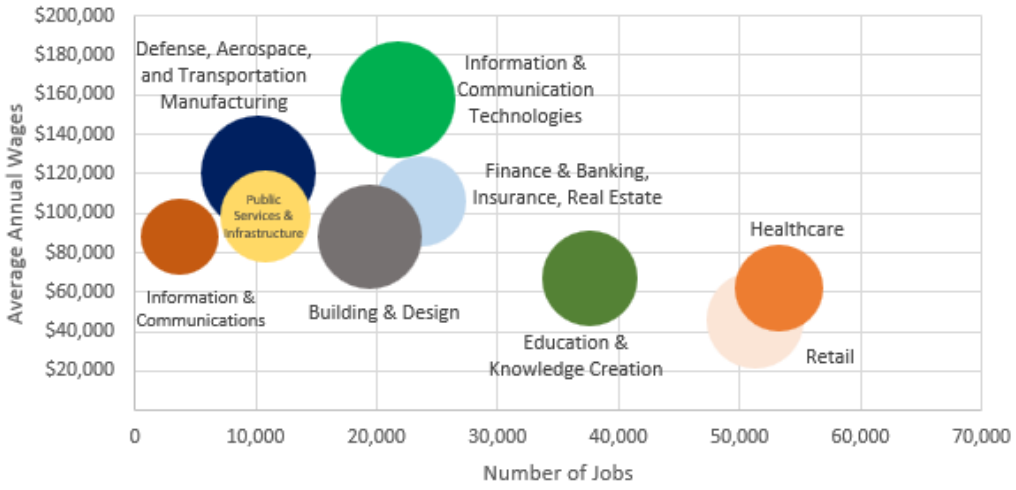


Figure 15 shows slow-growth industry clusters. These clusters have experienced zero growth or a decline in the past year. The largest declines were to the Building & Design and the Public Services & Infrastructure industry clusters.

Table 6: Overall Employment and Unemployment Rate by Region (2022)

	Industry Cluster	2021 Employment	Annual Average Wages	% Change (2021-2022)
Slow Growth Industries	Finance & Banking, Insurance & Real Estate	23,706	$105,705	0%
	Retail	51,344	$45,935	-1%
	Healthcare	53,251	$62,068	-2%
	Information & Communication	3,692	$87,981	-10%
	Information & Communication Technologies	21,771	$157,470	-7%
	Education & Knowledge Creation	37,361	$66,760	-20%
	Defense, Aerospace & Transportation Manufacturing	10,245	$120,670	-22%
	Building & Design	19,456	$88,066	-52%
	Public Services & Infrastructure	10,833	$98,574	-53%
High Growth Industries	Agriculture & Food	11,057	$53,059	1%
	Other Manufacturing	13,960	$79,826	4%
	Biotechnology & Biomedical Devices	26,166	$138,539	31%
	Logistics	17,436	$74,717	11%
	Professional & Business Services	54,877	$90,380	6%
	Tourism, Hospitatlity & Recreation	71,763	$35,349	13%

[18] Bubble size represents Location Quotient.

Job Quality

Another measure of economic vitality is how well a region is creating quality jobs. One way of doing this is to take data on occupations and then group these into tiers. (Tables 7 & 8, Figure 16)

Table 7: Job Tier Descriptions

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).

Figure 16: Employment Growth by Tier[19]

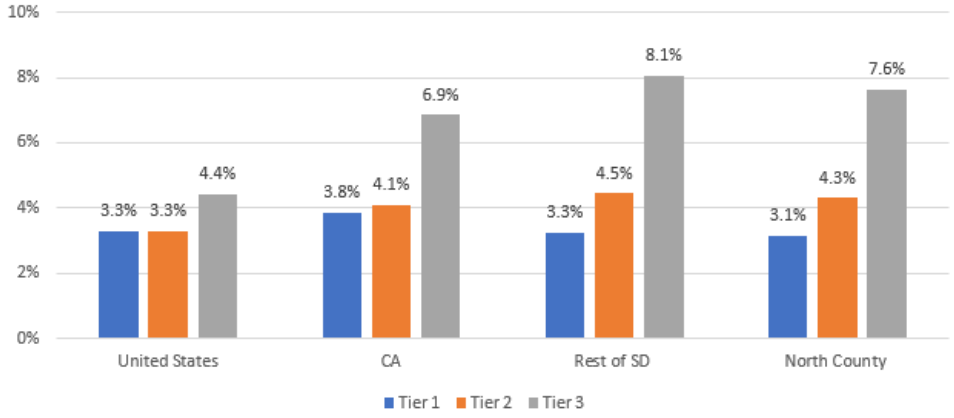


Table 8: Job Composition (%) by Tier [20]

	Tier 1	Tier 2	Tier 3
North County	22%	25%	53%
Rest of San Diego County	24%	25%	51%
California	22%	25%	53%
United States	22%	26%	52%

JobsEQ, 2022

[19] JobsEQ Q3 2022, American Community Survey 2021 5-year estimates.
[20] JobsEQ Q3 2022, American Community Survey 2021 5-year estimates.

Economic Distress

Economic distress measures both the challenges households face in the current economic environment and an assessment of economic resilience (how the region can endure and recover from an economic downturn). Living wage and inflation data were not available beyond the county level. The following section will address such economic distress metrics for San Diego County.

North County has several regional-specific costs related to geographic location, population density, and housing availability that make the region's living wage significantly higher than the national average. (Table 9 & Figure 17) This results in geographic pockets of poverty across the region, where people struggle to meet household costs and can't find another place within the region where costs are lower.

WHY DO THESE INDICATORS MATTER?

North County is among the more expensive regions to live in the nation. High cost of living means that many families may struggle to meet other daily household needs. It likely impacts savings rates and the ability of individuals and families to accumulate household wealth and stability. A sizable population struggling to make ends meet can also suppress local economies, as depressed purchases of goods and services can have multiplier effects throughout the region.

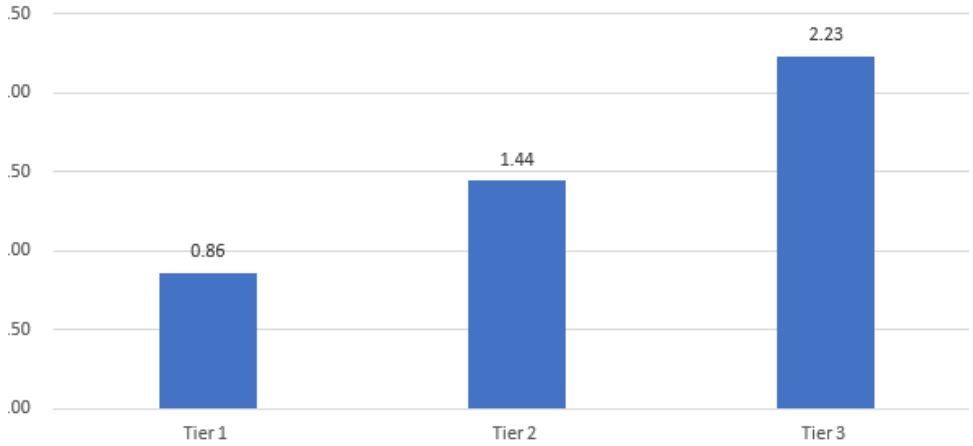
San Diego County's relatively high debt-to-income ratio is also a cause for concern. On average, households in San Diego County have over $2 of debt for every dollar of annual income. (Figure 18) This is a higher debt-to-income ratio than that in surrounding counties and the state, making the region less resilient to economic downturns. Moreover, 2021 marks the first year since 2016 that the debt-to-income ratio in San Diego County increased. Previously, it slowly declined from 2.0 in 2017 to 1.8 in 2020.

Much of this is likely driven by the region's high cost of living – especially home prices – as North County residents have taken on greater mortgage and personal debt to make ends meet.[21]

Table 9: Living Wage Definition in San Diego County

Family Size	Yearly Salary	Hourly Wages Required to Achieve Salary
2 Adults (1 working) & 2 Children	$97,947	$47.09

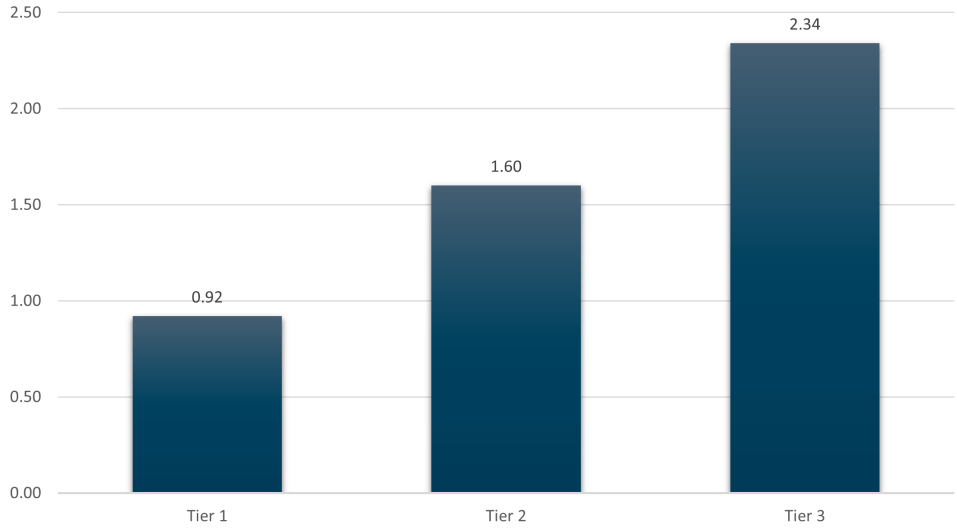
Figure 17: Number of Jobs Needed to Achieve a Living Wage in San Diego County [22]



[21] Federal Reserve.
[22] MIT. Living Wage Calculator.

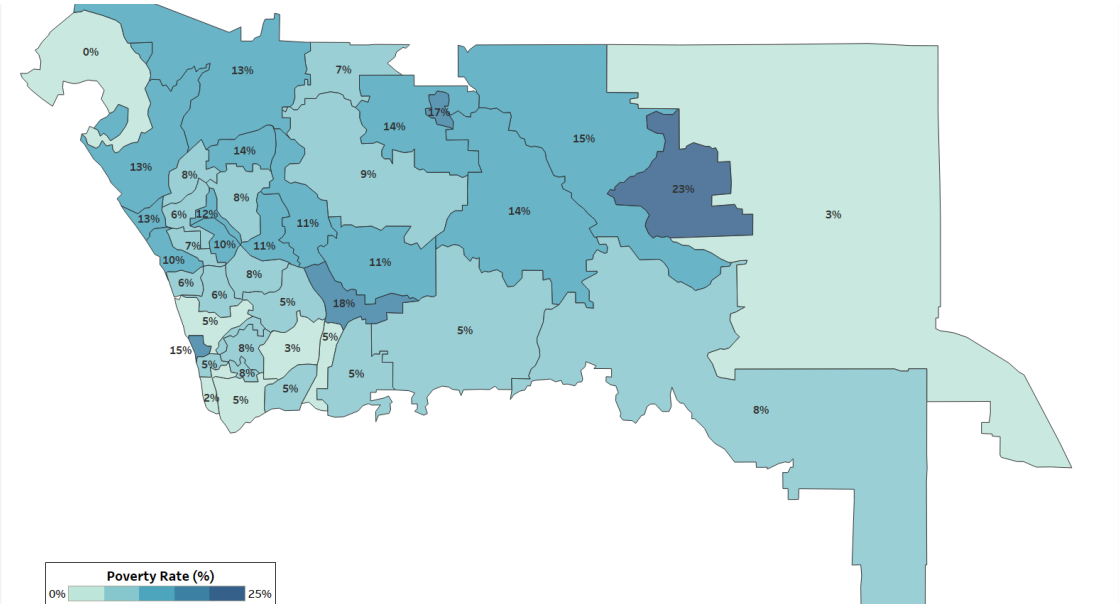
Compared to poverty rates, living wages include regional differences in housing costs, food, energy, and other essentials. The living wage in San Diego County is about $97,947 per year for a family of four (one parent working). This means it would take more than two tier-3 jobs (lower-skill, lower-paying) or about 1.5 tier-2 jobs for a family of four (one parent working) to earn a living wage in SD County.

Figure 18: Household Debt-to-Income Ratio



MIT Living Wage Calculator, San Diego County, 2022

Figure 19: Poverty Rate Among All Residents in North County



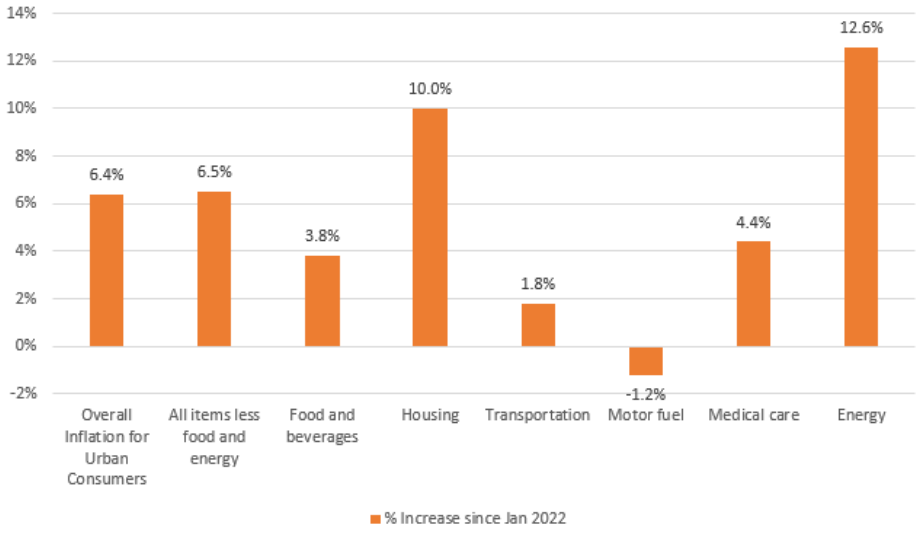
Geographic pockets of poverty are expected in inland, rural areas of North County. However, some coastal areas of North County have reached up to a 15 percent poverty rate, which indicates that the high cost of living could become unsustainable for some parts of an otherwise affluent population.[23] (Figure 19)

[23] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021

Inflation

Consumer prices in San Diego County increased by about 6.4 percent from January 2022 to January 2023. Urban consumers' inflation is largely driven by rising housing and energy costs. Increases in rent costs due to a limited housing inventory are the key driver of the 10 percent inflation rate for housing. Rising costs for electricity and natural gas caused the 12.6 percent price increase in energy.[24] (Figure 20)

Figure 20: Inflation Rate for San Diego County Consumers (Jan '22 - Jan '23)



[24] Bureau of Labor Statistics. Consumer Price Index, San Diego Area

Innovation

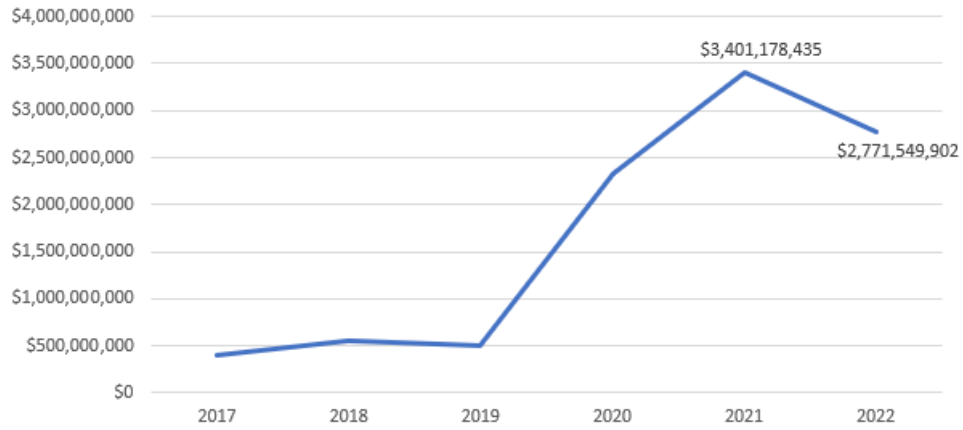
Innovation is at the heart of North County's economy. Venture Capital and R&D spending continue flowing into the region at record-breaking levels, fueling new company creation and productivity of the regional economy.

Innovation is measured by several metrics, such as venture capital raises, the ratio of business births and deaths, R&D funding, and patent approvals by inventors living in North County.

Funding

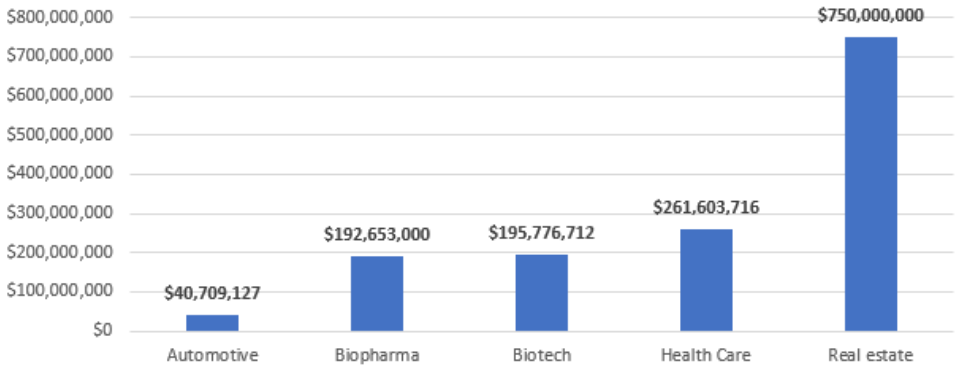
North County businesses raised nearly $2.8 billion in funds in 2022, a $600 million decline from the previous year. (Figure 21) That can be explained by a decrease in funds raised in the central coast and central inland regions of North County, which have raised over 60 percent fewer funds than in previous years. Most of the funding in North County goes to Pharmaceuticals, Biomedical, and Biotechnology firms, but 2022 saw a large flow of post-IPO funding to firms that work in Real Estate, Health Care, and Biopharma industries (Figure 22).[25]

Figure 21: Innovation Capital in North County



[25] Crunchbase. 2022 data.

Figure 22: Innovation Capital by Industry



New Business Formations

The formation of new businesses in San Diego County has shown steady growth, with a significant increase in new company formation occurring in 2021. This metric deserves particular attention in future years as San Diego and the state's rate of new business formation generally moved in parallel. The previous year, San Diego County exceeded it. (Figure 23)

Figure 23: New Business Formations (growth from 2007 baseline) [26]

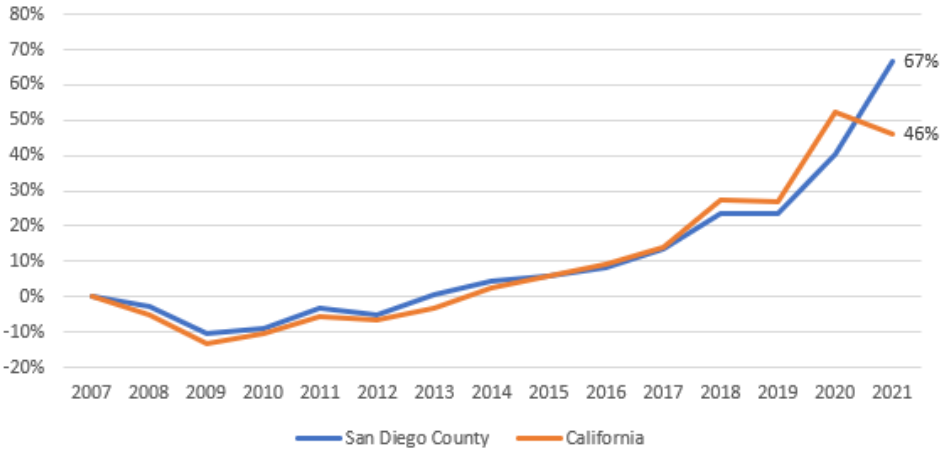
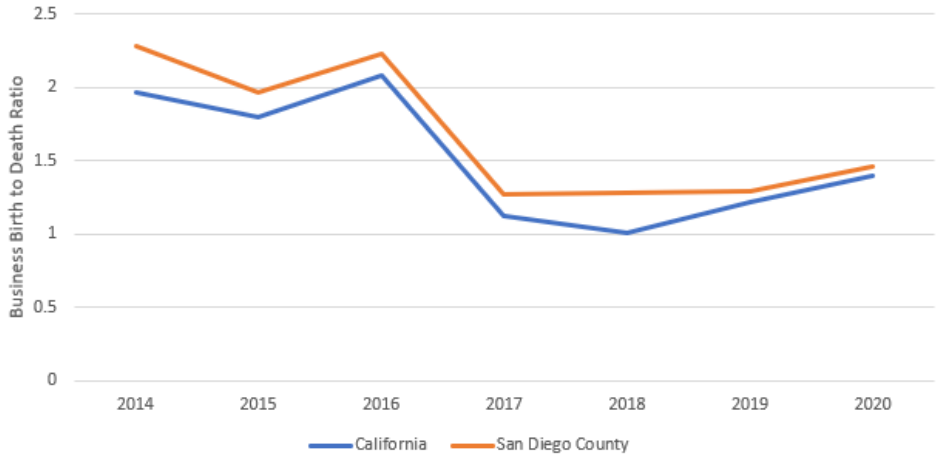


Figure 24: Business Birth-to-Death Ratio



[26] U.S. Census Bureau. Business Formation Statistics. Experimental Data

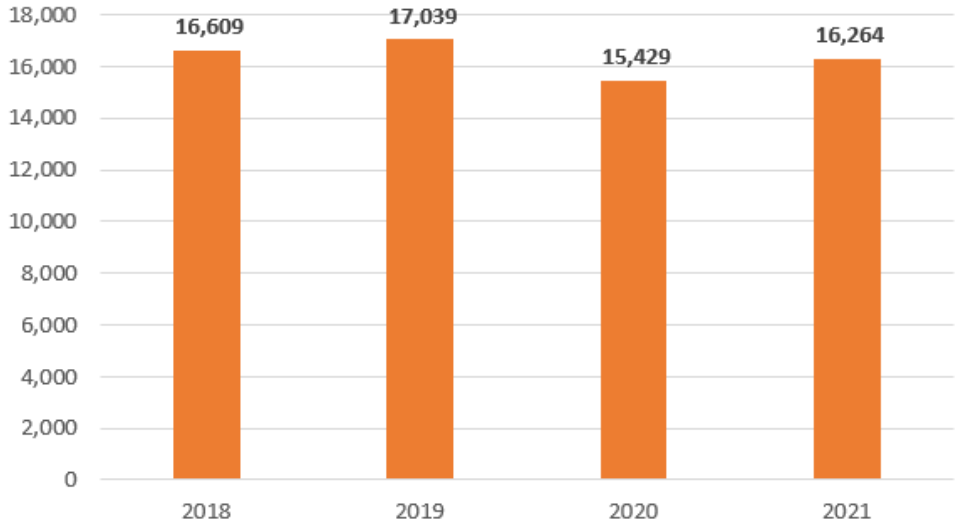
San Diego County has continuously enjoyed a greater business birth-to-death ratio than the statewide average, although both are trending at comparable levels since 2019. Figure 24 shows that San Diego county has a greater rate of net business growth than the rest of California.

Clean Energy

Clean Energy employmeny in North County remains largely flat. The region has seen widespread adoption of rooftop solar and larger installations, and there are several interesting start-ups working in the space. Yet, the region has yet to see the emergence of rapidly growing and scalable enterprises in the Clean Energy sector. Policymakers should consider ways to incentivize and support local companies engaged in the efforts to help California meet ambitious clean energy and decarbonization goals. A bright spot is that the region continues seeing more clean energy investments, and North County residents embrace rooftop solar and electric vehicles.

Employment in North County's Clean Energy industry recovered well from the effects of the pandemic, which led to a loss of about 1,600 jobs from 2019 to 2020. In 2021, Clean Energy in North County had close to 16,300 workers and had recovered about 50% of the jobs lost during the pandemic. (Figure 25)

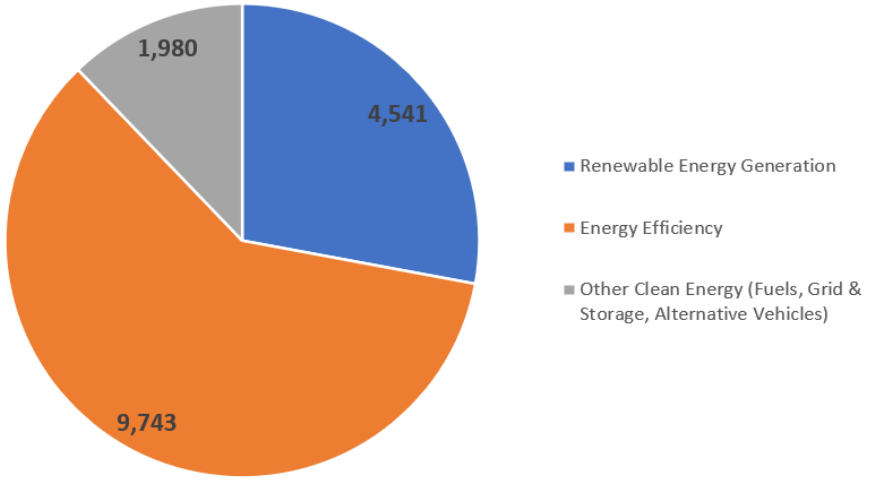
Figure 25: Clean Energy Jobs in North County [27]



Most (60%) clean energy jobs in North County are in Energy Efficiency technologies, including the manufacturing and installation of building retrofits, and energy-efficient appliances and equipment. About a third (28%) of North County's Clean Energy workforce focuses on Renewable Energy Generation and the relevant technologies, such as solar installations. (Figure 26)

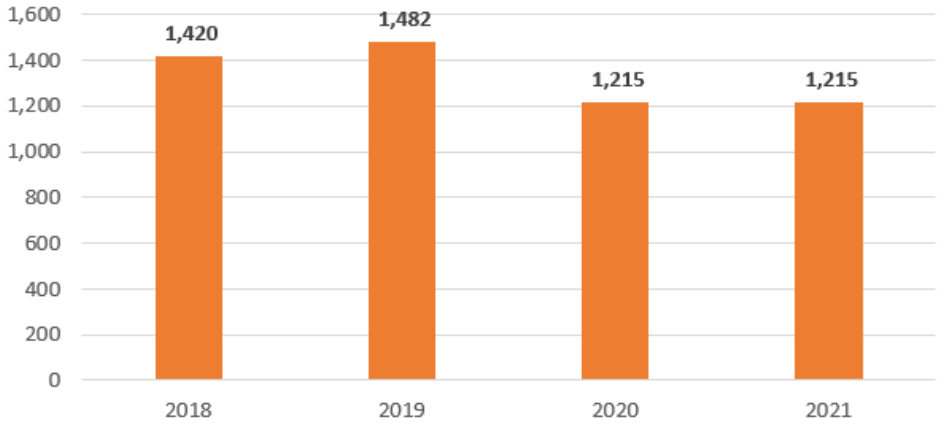
[27] 2021 Clean Energy jobs from the 2022 U.S. Energy and Employment Report (latest available as of April 2023)

Figure 26: North County Clean Energy Jobs by Technology



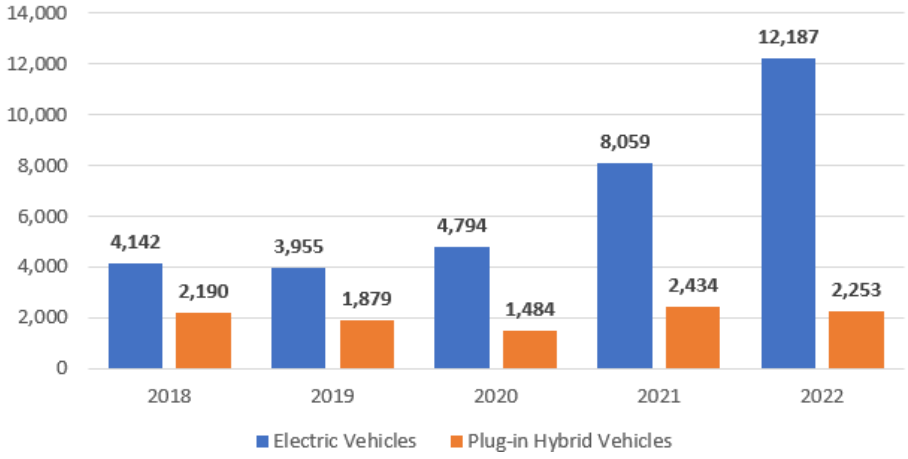
The number of clean energy establishments and firms in North County declined during the COVID-19 pandemic and has not returned to pre-pandemic levels. With California's ambitious clean energy goals, North County can be expected to host new clean energy establishments provided good incentives (such as the previously presented indicators) are present. (Figure 27)

Figure 27: North County Clean Energy Establishments



The adoption of Electric Vehicles in North County has greatly increased in the past five years. While the number of Plug-in Hybrid Electric Vehicles (PHEV) sales has remained constant since 2018, the sales of Electric Vehicles in North County have nearly tripled in this same period. In 2022, almost 7,400 more EVs were sold in North County than in 2020. (Figure 28)

Figure 28: Alternative Vehicles in North County [28]

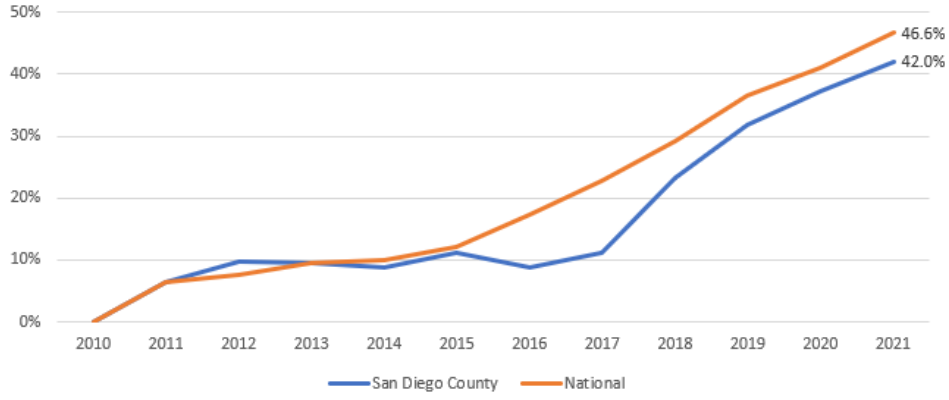


Research and Development

San Diego County continues to see dramatic increases in research and development activities in 2021. UC San Diego continues to be the greatest source of R&D expenditures. The university granted and received over $1.4 billion for research and development in 2021, accounting for 70 percent of overall R&D expenditures received by academic institutions in the region in that same year. [29] (Figure 29)

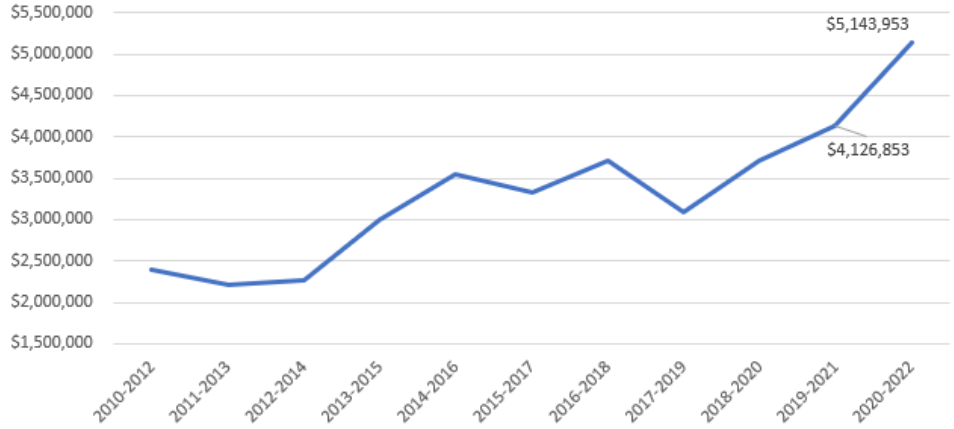
Other funding sources include Phase I Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR). North County residents received a significant amount of Phase I SBIR and STTR funding in 2022, amounting to over $5.1 million in research grants. [30] (Figure 30)

Figure 29: Research and Development Expenditures in Universities



[28] California Energy Commission Zero Emission Vehicle and Infrastructure Statistics (www.energy.ca.gov/)
[29] National Center for Science and Engineering Statistics. Higher Education Research and Development Survey.
[30] The Small Business Innovation Research and Small Business Technology Transfer Programs.

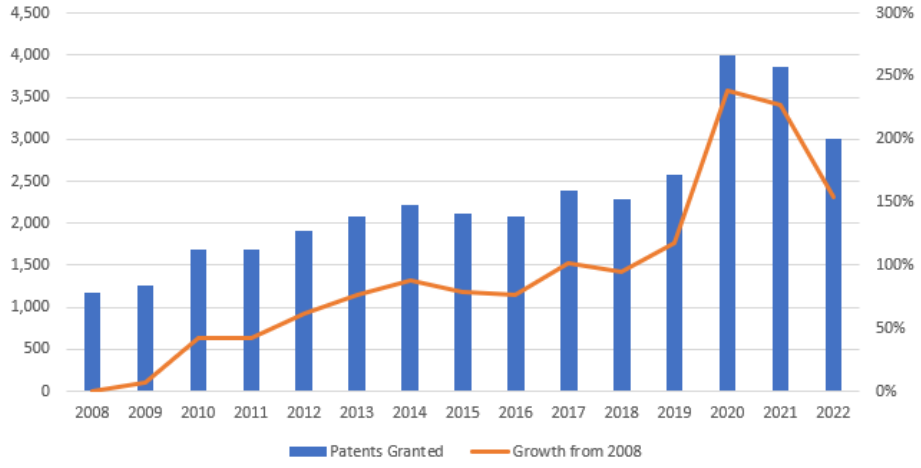
Figure 30: Phase I SBIR and STTR Funding



Patents

The number of patents granted to investors located in North County has grown exponentially since the baseline year of 2008. In 2022, 3,000 patents were granted to inventors in the North County region, a 200% increase over 2008. These numbers suggest that the region has continued to attract innovative companies and entrepreneurs, bringing new designs and products to the marketplace in various industries. [31]

Figure 31: Patents Granted in North County



[31] PatentsView. 2022 data.

Education

Education plays an important role in the world of work, as high-paying jobs increasingly become more technical and specialized.

In aggregate, these metrics highlight North County's success in education. Close to one-half (45%) of adults have a bachelor's degree or advanced degree, and the proportion of adults without a high school diploma is notably lower than in surrounding counties. (Table 10 & 11) North County's current students are doing relatively well in their educational pursuits, exceeding state proficiency averages in Math and English Language.

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's population can be considered extremely well-educated, as over 44 percent of residents have a bachelor's degree or higher. These averages are higher than in the rest of San Diego county, neighboring regions, statewide, and national averages. Educational attainment is an important metric for economic development, as it signals to businesses that North County has the appropriate workforce to support their needs.

WHY DOES THIS 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 10: Educational Attainment by Region [32]

	No High School Diploma	High School Graduate	Some College, No Degree	Associate Degree	Bachelor's Degree	Postgraduate Degree
United States	10.5%	25.4%	20.5%	9.3%	21.6%	12.7%
North County	10.4%	16.0%	21.1%	7.9%	27.3%	17.3%
Rest of SD	11.4%	19.2%	22.9%	8.7%	24.5%	13.3%
SD County	11.0%	18.1%	22.2%	8.4%	25.4%	14.7%
California	15.2%	20.4%	21.0%	8.0%	22.6%	12.9%
Orange County	13.6%	17.0%	19.7%	7.6%	27.7%	14.4%
Los Angeles County	18.5%	20.4%	19.3%	7.1%	23.0%	11.6%
Santa Clara County	9.9%	13.0%	14.2%	6.6%	29.2%	27.1%

Table 11: Educational Attainment by Cities of North County

	No High School Diploma	High School Graduate	Some College, No Degree	Associate Degree	Bachelor's Degree	Postgraduate Degree
Carlsbad	2.1%	10.0%	18.1%	7.7%	35.5%	24.0%
Del Mar	0.0%	3.3%	9.9%	2.6%	37.1%	45.9%
Escondido	13.6%	22.1%	24.5%	7.4%	16.7%	8.8%
Encinitas	3.2%	9.0%	14.9%	7.7%	36.3%	27.2%
Oceanside	8.2%	19.3%	26.0%	8.4%	20.8%	12.1%
San Marcos	6.8%	18.0%	20.5%	8.4%	27.1%	13.8%
Solana Beach	1.6%	9.3%	11.9%	5.9%	40.8%	28.4%

[32] JobsEQ Q3 2022, American Community Survey 2021 5-year estimates.

Performance & Completions

In the 2020-2021 school year, students across San Diego County scored above state averages in Math and English Language Arts proficiency. Students from San Diego County tend to score higher than students from neighboring regions and across California, apart from Santa Clara and Orange Counties. [33]

WHY DOES THIS MATTER?

Statewide test scores indicate that high rates of students in North County are 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 12: CAASPP Math Profieciency by Region

California	San Diego County	Riverside County	Los Angeles County	Santa Clara County	Orange County
33%	39%	26%	33%	51%	45%

Table 13: CAASPP English Profieciency by Region

California	San Diego County	Riverside County	Los Angeles County	Santa Clara County	Orange County
47%	53%	42%	47%	61%	57%

Table 14: CAASPP Math Profieciency by School District

Poway Unified	San Dieguito Union	Escondido Union	San Marcos Unified	Vista Unified
44.5%	42.2%	11.7%	29.5%	17%

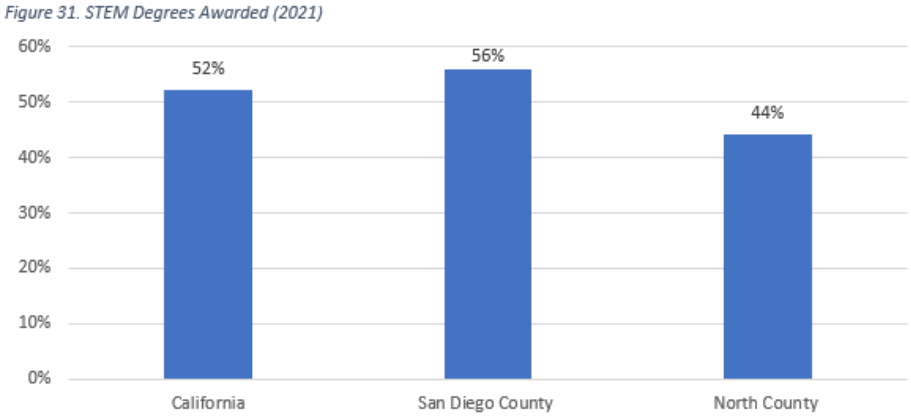
Table 15: CAASPP Math Profieciency by School District

Poway Unified	San Dieguito Union	Escondido Union	San Marcos Unified	Vista Unified
41.6%	46%	10.2%	23.5%	12.3%

[33] Ed-Data.

North County continues to award a high amount of STEM degrees, albeit at a lower rate than the rest of San Diego County. [34] (Figure 32)

Figure 32: STEM Degrees Awarded (2021)



[34] JobsEQ Q3 2022, American Community Survey 2021 5-year estimates.

Place

North County has unique weather, schools, and recreational opportunities. Quality of life is a primary driver of economic development, and North County has leveraged these attributes to attract top businesses and talent to the region.

However, North County also faces challenges when it comes to increasing housing costs, traffic, rental rates for commercial spaces, and public transportation. The indicators in this section evaluate how these areas are changing in order to better understand how the quality of life in North County is changing.

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 of 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.

Residential Real Estate

The cost of living and working in North County declined slightly since 2020 but remains high compared to other parts of California and the state. Median house sale prices in North County are only surpassed by Santa Clara County in these comparable regions. (Figure 33) Housing availability is relatively low in most North County cities, except for Del Mar and Solana Beach (two of the most affluent cities). Together, over 14 percent of the two cities' housing units are available. (Please note data does not allow us to determine the extent to which high vacancy rates reflect second home ownership.)

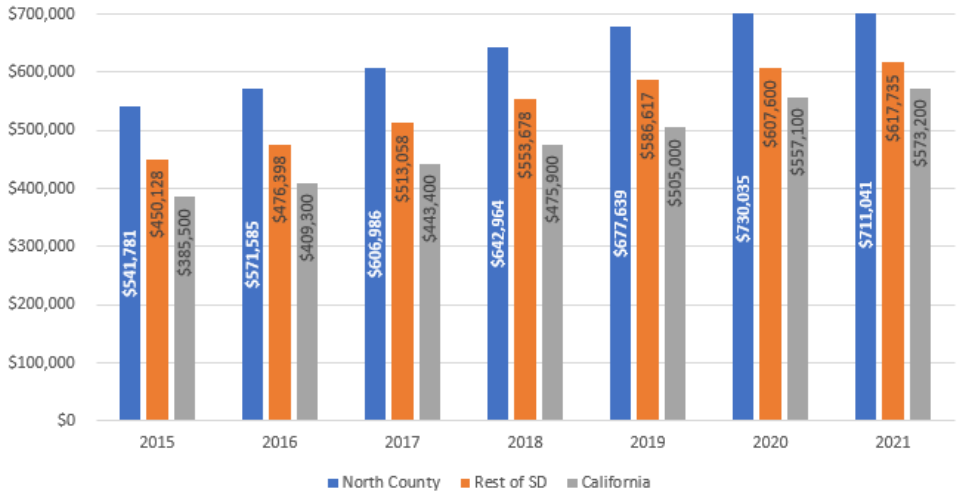
WHY DOES THIS MATTER?

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.

Housing indicators are important as high housing costs can make living in a region unsustainable for some and contribute to hiring and retention issues for the region's employers.

Figure 33: Median House Sale Prices [35]



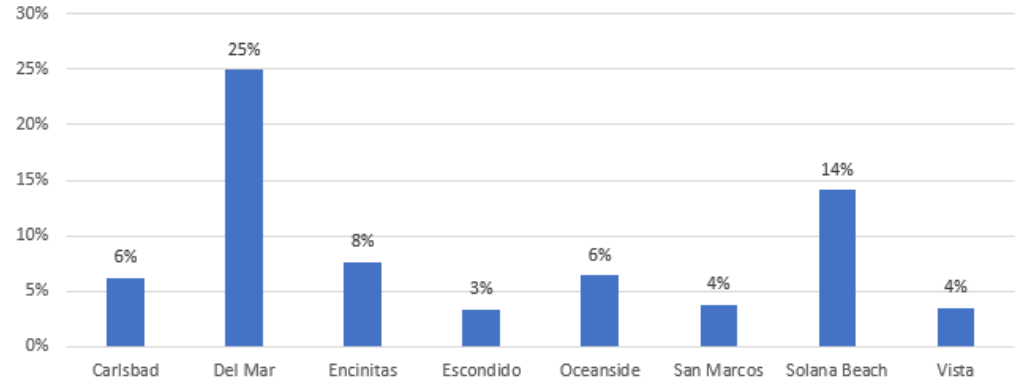
About two in five (38%) North County housing units are occupied by renters, much lower than the 51 percent in the rest of San Diego County and the state average of 45 percent. The Central Coast is the region with the most housing availability, mainly in Del Mar and Solana Beach, regions with higher median home prices. (Table 16 & Figure 34)

Table 16: Housing Statistics by Region [36]

	North County	Rest of San Diego	San Diego County	Orange County	Los Angeles County	Santa Clara County	California
Median home price	$717,772	$614,119	$595,600	$703,800	$615,500	$1,061,900	$538,500
Homeowner Vacancy	1%	1%	1%	1%	1%	1%	1%
Renter Vacancy	4%	4%	4%	4%	4%	4%	4%
Renter-occupied housing units	38%	51%	46%	43%	54%	44%	45%

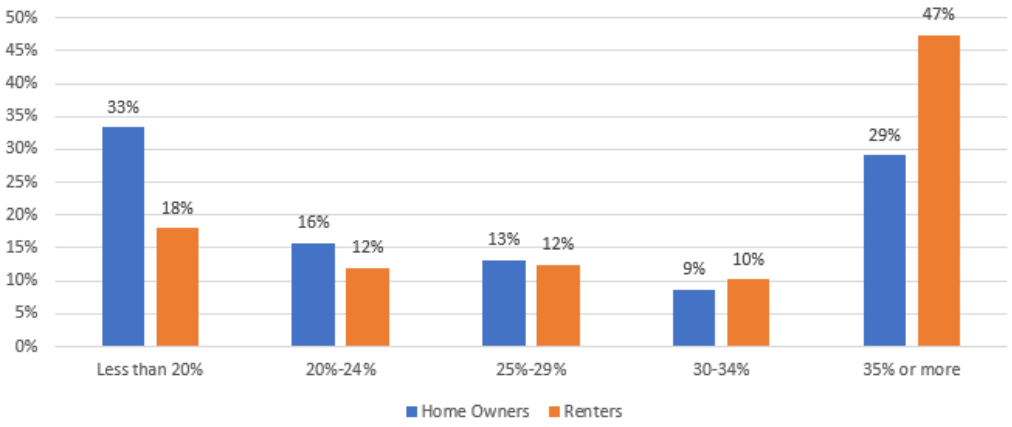
[35] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021
[36] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021

Figure 34: Available Housing Units [37]



One of the main consequences of high housing costs is how it "crowds out" other spending and can make households less economically resilient. Almost half (47%) of North County's renters spend 35 percent of their income or more on housing. (Figure 35) This leaves households with less savings and disposable income for daily expenses. In these cases, renters are prone to economic distress after any small increases in prices one or when encountering unforeseen circumstances.

Figure 35: Housing Costs as a Percentage of Household Income [38]



Jobs-Housing Balance

It is important for a region to balance the number of jobs created with the number of housing units available. The Job-Housing balance provides an outlook of North County's ability to host new talent and can be a useful measure to attract talent that is able to both live and work in the region.

From 2012 to 2022, the seven largest cities in North County added just over 15,000 housing units. This measure of actual homes is likely a better metric of housing gains than permits (a small but still significant number of building permits are not acted upon during the later phases of the entitlement and permitting process). The E-5 estimates reflect data submitted by various planning departments to the state, revealing the actual number of housing units in their jurisdiction on the first of every calendar year. [39]

[37] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021
[38] U.S. Census Bureau, American Community Survey, 5-year estimates, 2021
[39] JobsEQ Q3 2022, American Community Survey 2021 5-year estimates.

WHY DOES THIS MATTER?

When significantly more jobs than housing units are added to an economy, it creates challenges in supply, demand, and price. Lower wage workers are forced further afield to search for shelter, or increasingly, find roommates and increase household size. Others find themselves unhoused, still working, but unable to afford permanent shelter. Over the past 5 years, the ratio of housing to job creation (about 1:10) has been problematic. This is likely the principal culprit behind dramatic price increases in recent years, as well as the increased number of individuals who work for North County companies but seek shelter in Southwest Riverside County.

Table 17 below shows the annual number of housing units added compared to the annual change in jobs in North County in the past 4 years. Generally, North County's workforce is growing much faster than the number of housing units required to host these new workers. Although the pandemic caused big slumps in available jobs in 2020 and 2021; in 2022, employment recovered to its previous regional trend (adding many new jobs and not enough housing to accommodate them). From 2021 to 2022, Carlsbad (400) and Vista (550) added the most housing units in North County. During that same time, Carlsbad (5,700), Oceanside (3,000), and Escondido (2,900) added the most jobs, demonstrating the staggering discrepancy between the creation of housing and jobs.

Table 17: Annual Job-Housing Balance in North County [40]

	North County	Rest of San Diego	San Diego County	Orange County
Housing Units Added from Previous Year	1,793	2,994	1,318	1,821
Change in Number of Jobs from Previous Year	3,900	-11,928	-8,935	19,530

Table 18: Job-Housing Balance from 2021 to 2022

City	Housing Units Added from 2021 to 2022	Change in Number of Jobs from 2021 to 2022
Oceanside	277	2,964
San Marcos	92	2,656
Escondido	223	2,941
Carlsbad	404	5,692
Vista	547	2,001
Poway	124	1,311
Encinitas	154	1,966
North County	1,821	19,530

[40] California Department of Finance, Demographic Research Unit, Report E-5 by Geography. JobsEQ.

Transportation

The pandemic greatly affected North County commute patterns and led to a greater acceptance of remote and hybrid employment schedules. Work-from-home increased by 84 percent in the past 6 years. In 2016, about 44,600 North County residents worked from home; in 2022, more than 82,100 workers worked remotely. Many of these employees started working remotely as a result of the pandemic in 2020, and firms adapted to make remote work an option or a policy. Those North County residents who commute to a work location spend an average of 27 minutes per commute. (Table 19) This is slightly below the California average but still higher than most comparable regions and the rest of San Diego.

WHY DOES THIS MATTER?

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

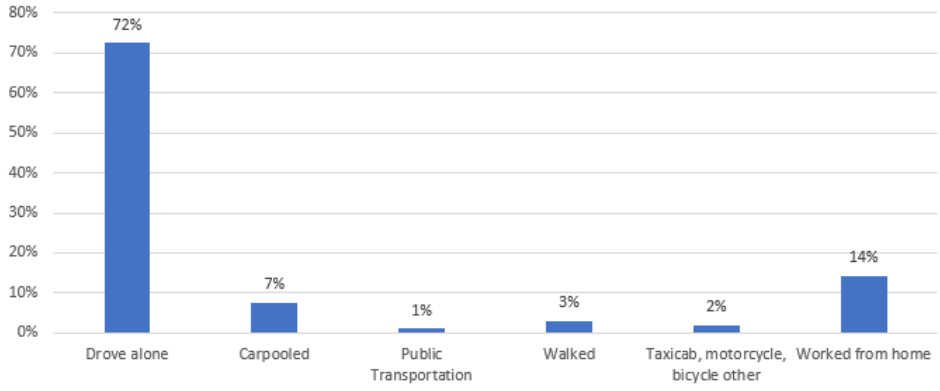
Table 19: Mean Travel Time to Work [41]

	North County	Rest of San Diego	San Diego County	Orange County	Los Angeles County	Santa Clara County	California	United States
Mean Travel Time to Work (min.)	27.1	26.1	24.5	26.1	29.2	23.8	27.6	25.6

A large portion of North County residents adopted remote work. In 2022, about 14 percent of North County workers worked from home, up from 11 percent in the previous year.

Most North County workers (72%) still drive alone to work, but the proportion is down from 75 percent in the previous year. Less than 15 percent of workers in North County carpool, walk, or use public transportation. (Figure 41)

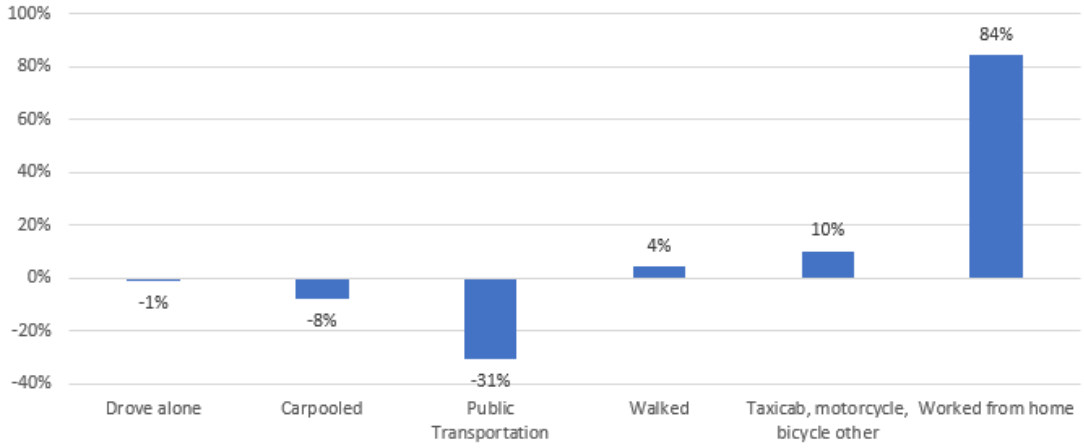
Figure 36: Commuting Patterns in North County, 2022



[41] ACS 5-year estimates 2016-2020

Use of public transportation decreased by over 30 percent in the past year, and carpooling decreased by about 8 percent (Figure 37). As the number of people working from home has increased, the amount of traffic congestion has slightly decreased. As a result, commuting by car has become more time-efficient, increasing demand.

Figure 37: Changes in Commuting Patterns in North County from 2016 to 2022 [42]



[42] ACS 5-year Estimates 2016-2020

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Quick Facts: 9 Incorporated North County Cities

Pages 41- 50 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.

OCEANSIDE

176,754
CA Department of Finance, E5 Estimates
2021 Population

66,283
CA Department of Finance, E5 Estimates
2021 Housing Units

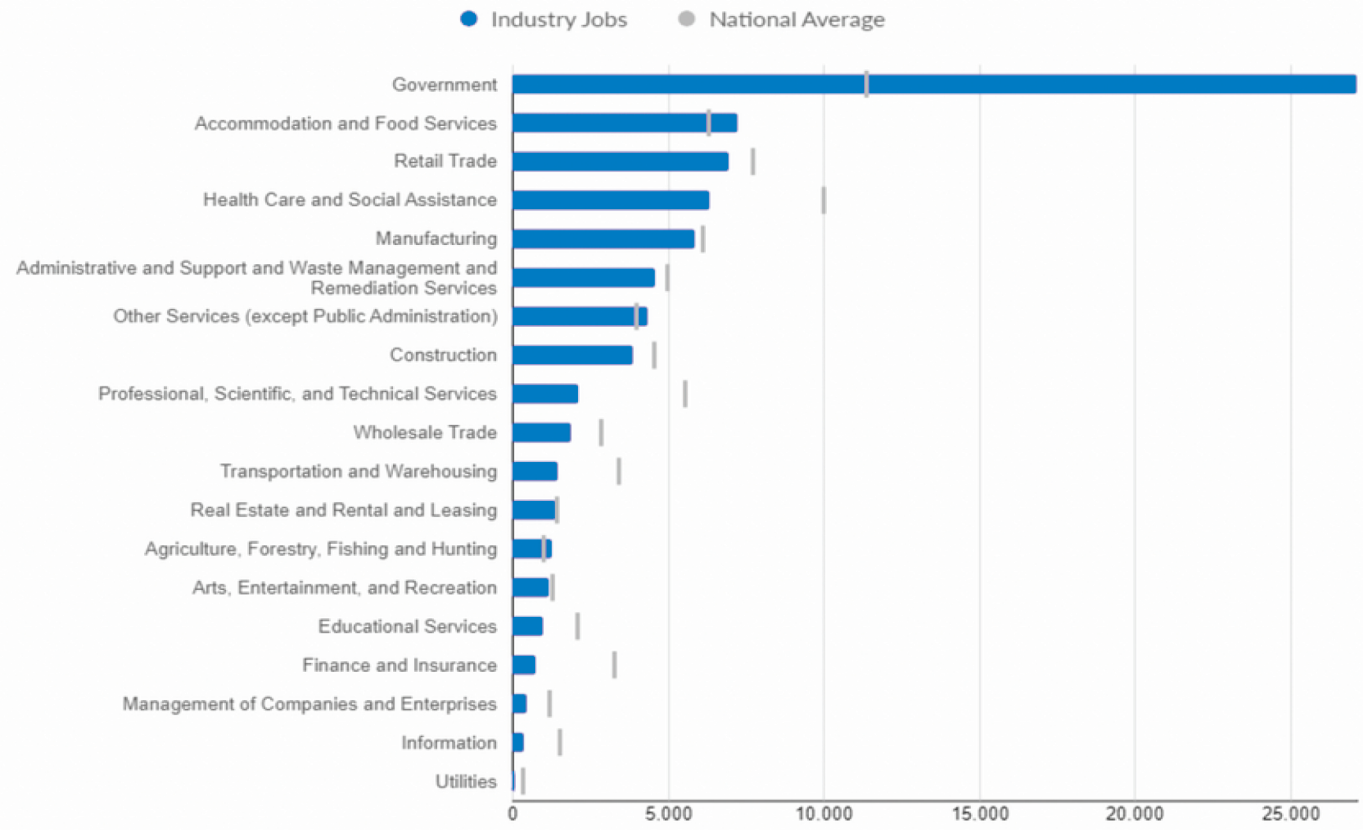
76,374
Emsi, 2022
2022 Employment

30.1%
2019 1 year ACS
Bachelor's Degree Atainment
Adults 25 years or older

$87,744
2018 5-year ACS
Median Household Income

29 Minutes
2018 5 year ACS
Average Travel Time to Work

Largest Industries



CARLSBAD

112,930
ESRI, 2021* **2021 Population**

44,107
ESRI, 2021* **2021 Housing Units**

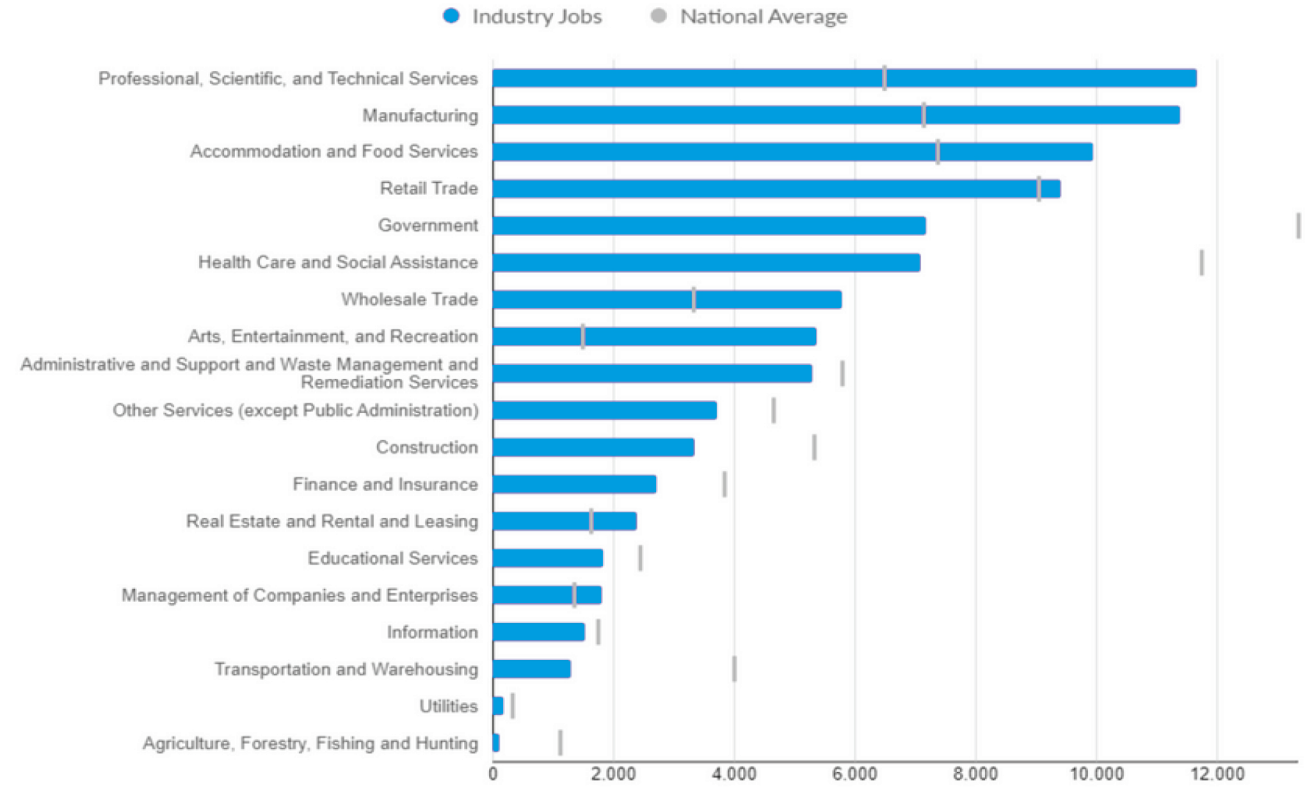
80,858
ESRI, 2021* **2022 Employment**

61.1%
2019 1 year ACS **Bachelor's Degree Atainment**
Adults 25 years or older

$120,203
ESRI, 2021* **Median Household Income**

28.2 Minutes
2018 5 year ACS **Average Travel Time to Work**

Largest Industries



ENCINITAS

62,289
CA Department of Finance, E5 Estimates
2021 Population

26,760
CA Department of Finance, E5 Estimates
2021 Housing Units

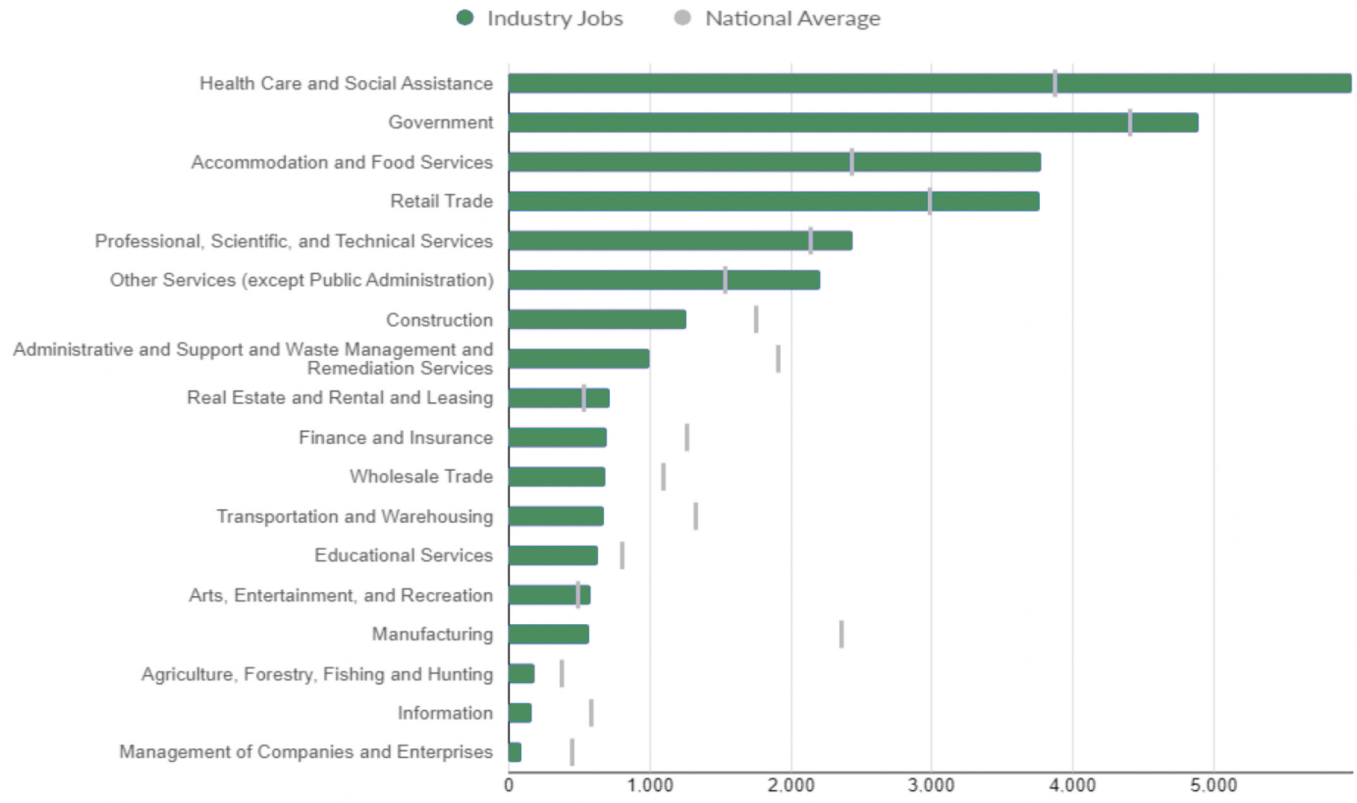
29,737
Emsi, 2022
2022 Employment

61%
2019 1 year ACS
Bachelor's Degree Atainment
Adults 25 years or older

$113,175
2018 5-year ACS
Median Household Income

25.2 Minutes
2018 5 year ACS
Average Travel Time to Work

Largest Industries



SOLANA BEACH

Vista State of the City Brochure*

13,827
2021 Population

CA Department of Finance, E5 Estimates

6,601
2021 Housing Units

Emsi, 2022

10,283
2022 Employment

2019 1 year ACS

65.1%
Bachelor's Degree Atainment
Adults 25 years or older

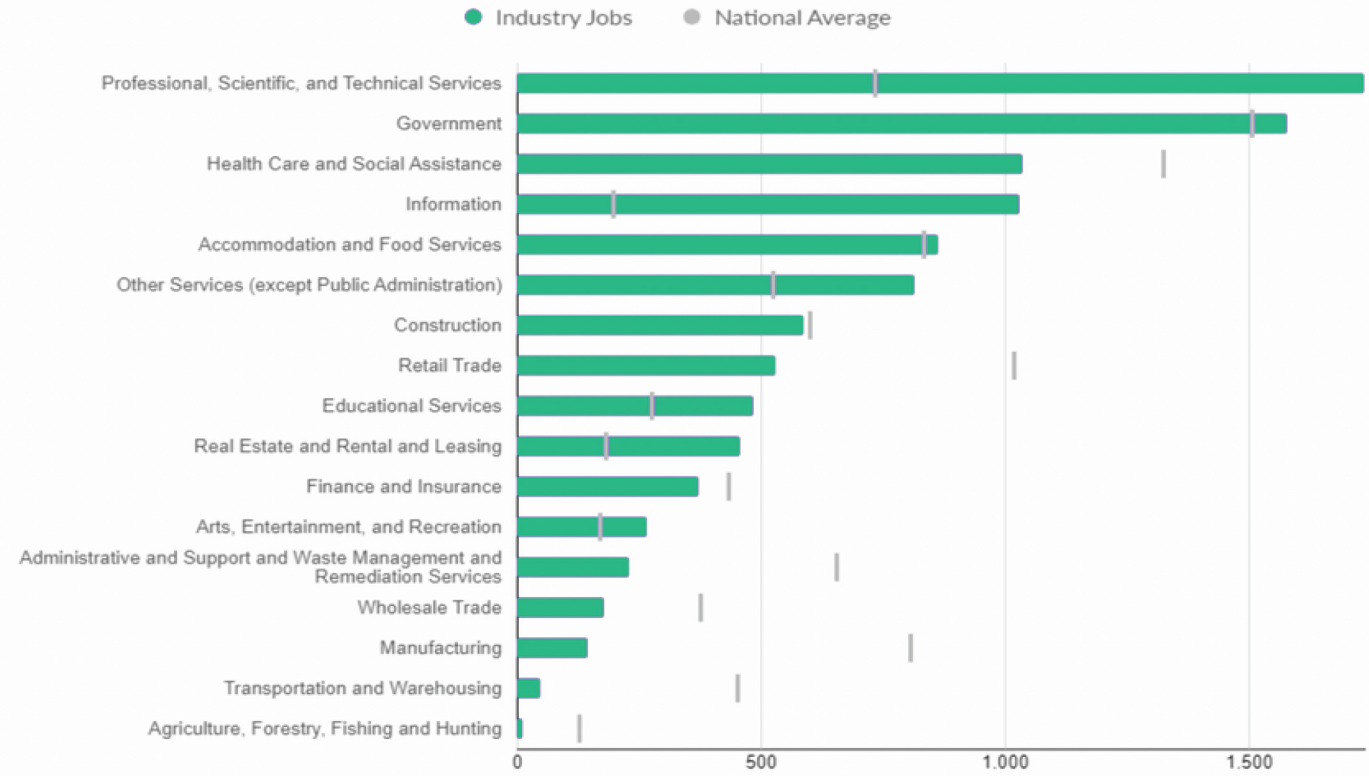
2018 5-year ACS

$105,821
Median Household Income

2018 5 year ACS

23 Minutes
Average Travel Time to Work

Largest Industries



POWAY

48,936
CA Department of Finance, E5 Estimates
2021 Population

16,949
CA Department of Finance, E5 Estimates
2021 Housing Units

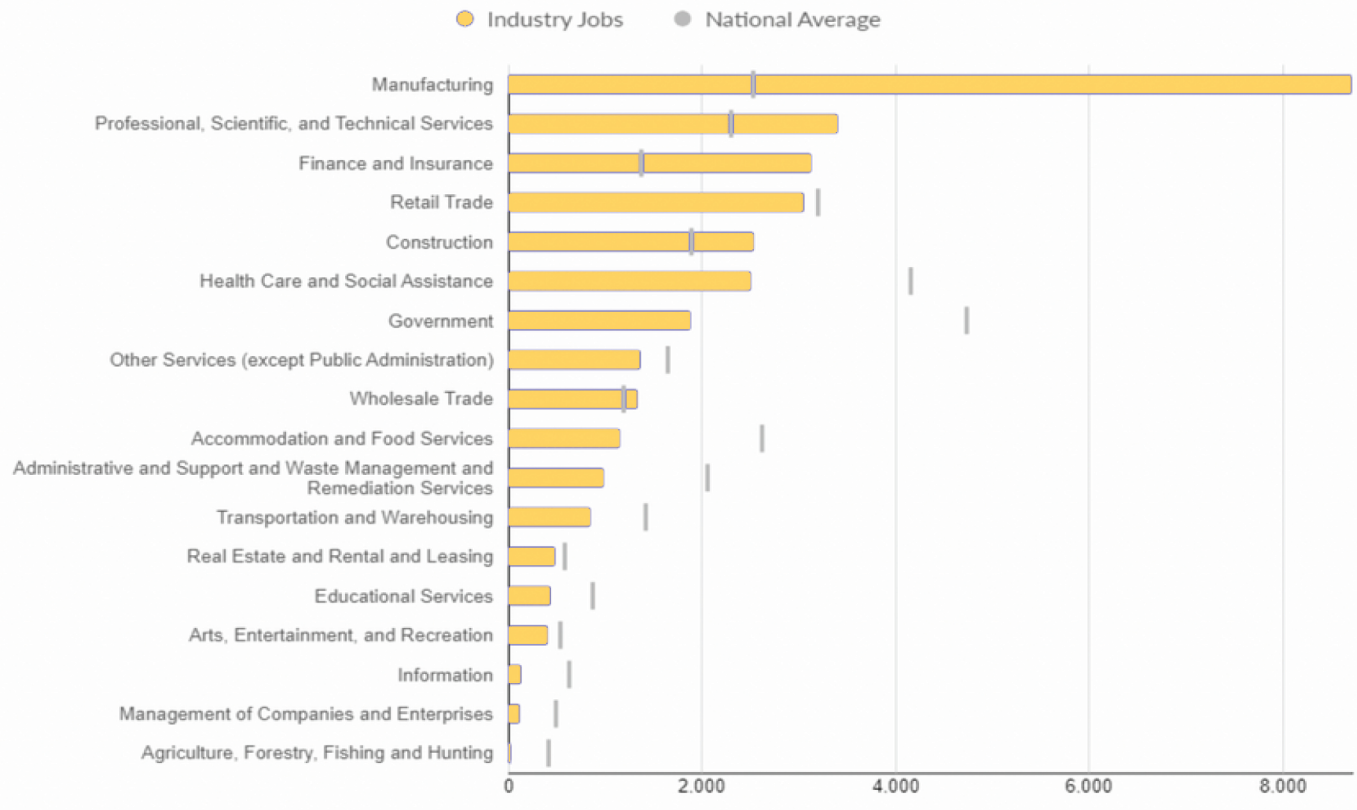
32,673
Emsi, 2022
2022 Employment

47.8%
2019 1 year ACS
Bachelor's Degree Atainment
Adults 25 years or older

$105,732
2018 5-year ACS
Median Household Income

25.7 Minutes
2018 5 year ACS
Average Travel Time to Work

Largest Industries



DEL MAR

4,258
CA Department of Finance, E5 Estimates
2021 Population

2,633
CA Department of Finance, E5 Estimates
2021 Housing Units

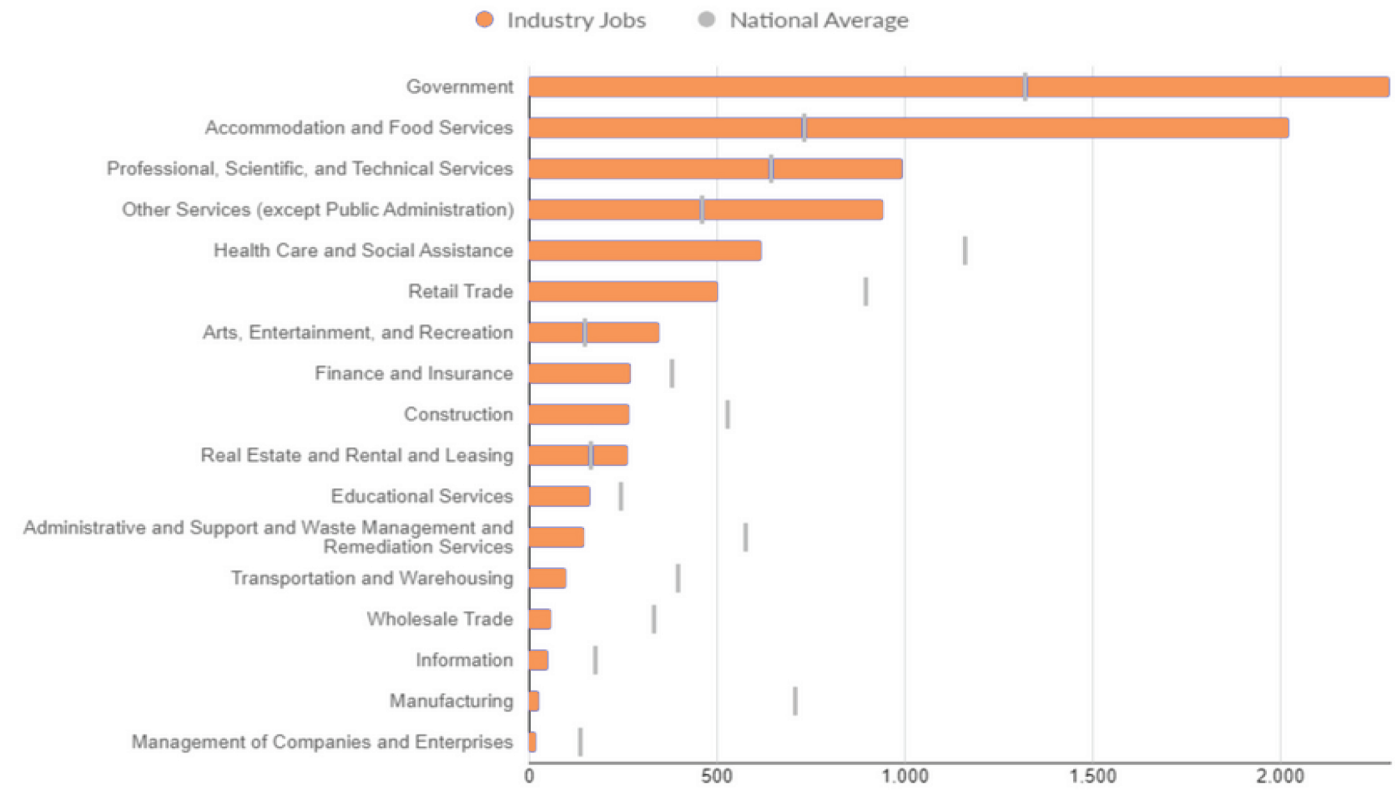
9,046
Emsi, 2022
2022 Employment

75.2%
2019 1 year ACS
Bachelor's Degree Atainment
Adults 25 years or older

$120,203
2018 5-year ACS
Median Household Income

25.7 Minutes
2018 5 year ACS
Average Travel Time to Work

Largest Industries



SAN MARCOS

96,302
CA Department of Finance, E5 Estimates
2021 Population

32,700
CA Department of Finance, E5 Estimates
2021 Housing Units

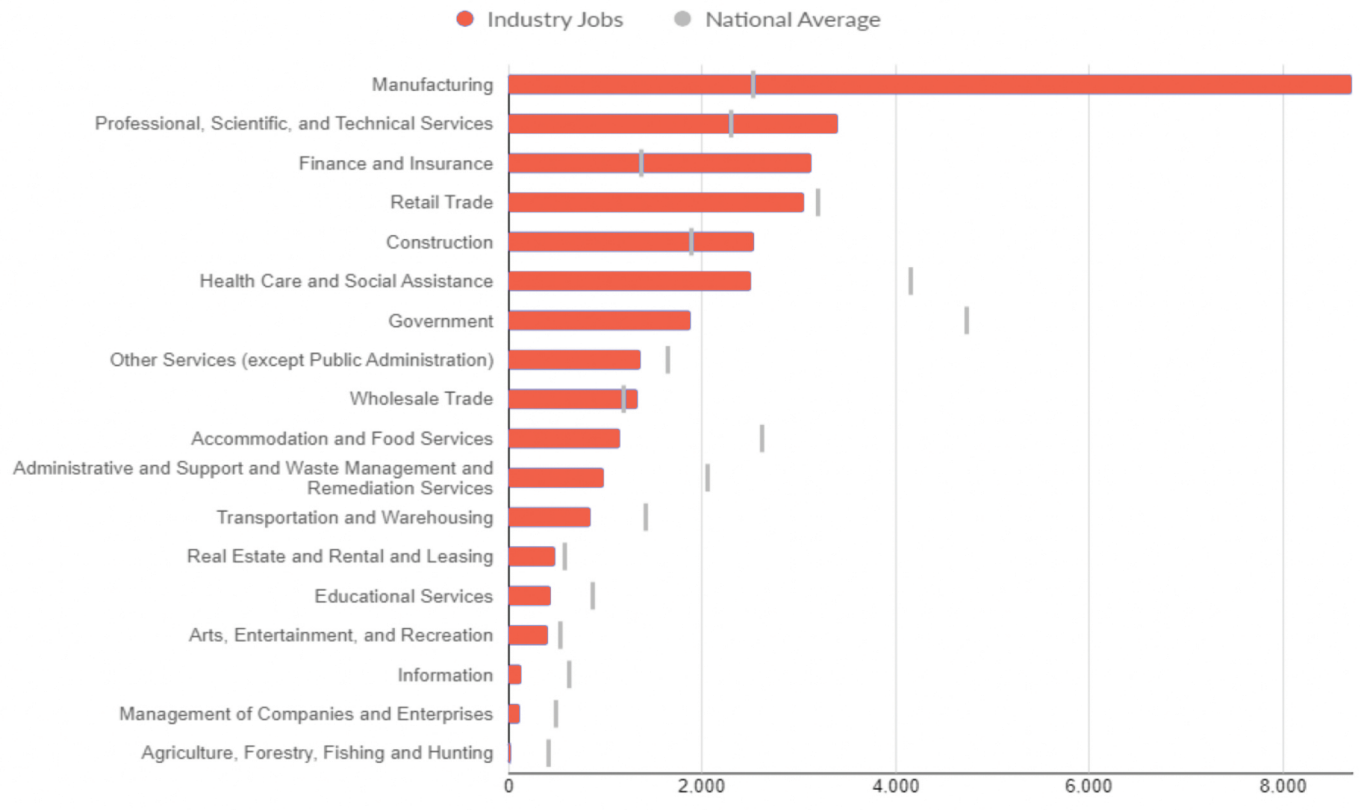
47,055
Emsi, 2022
2022 Employment

39.9%
2019 1 year ACS
Bachelor's Degree Atainment
Adults 25 years or older

$76,619
2018 5-year ACS
Median Household Income

26.1 Minutes
2018 5 year ACS
Average Travel Time to Work

Largest Industries



ESCONDIDO

151,688
CA Department of Finance, E5 Estimates
2021 Population

49,386
CA Department of Finance, E5 Estimates
2021 Housing Units

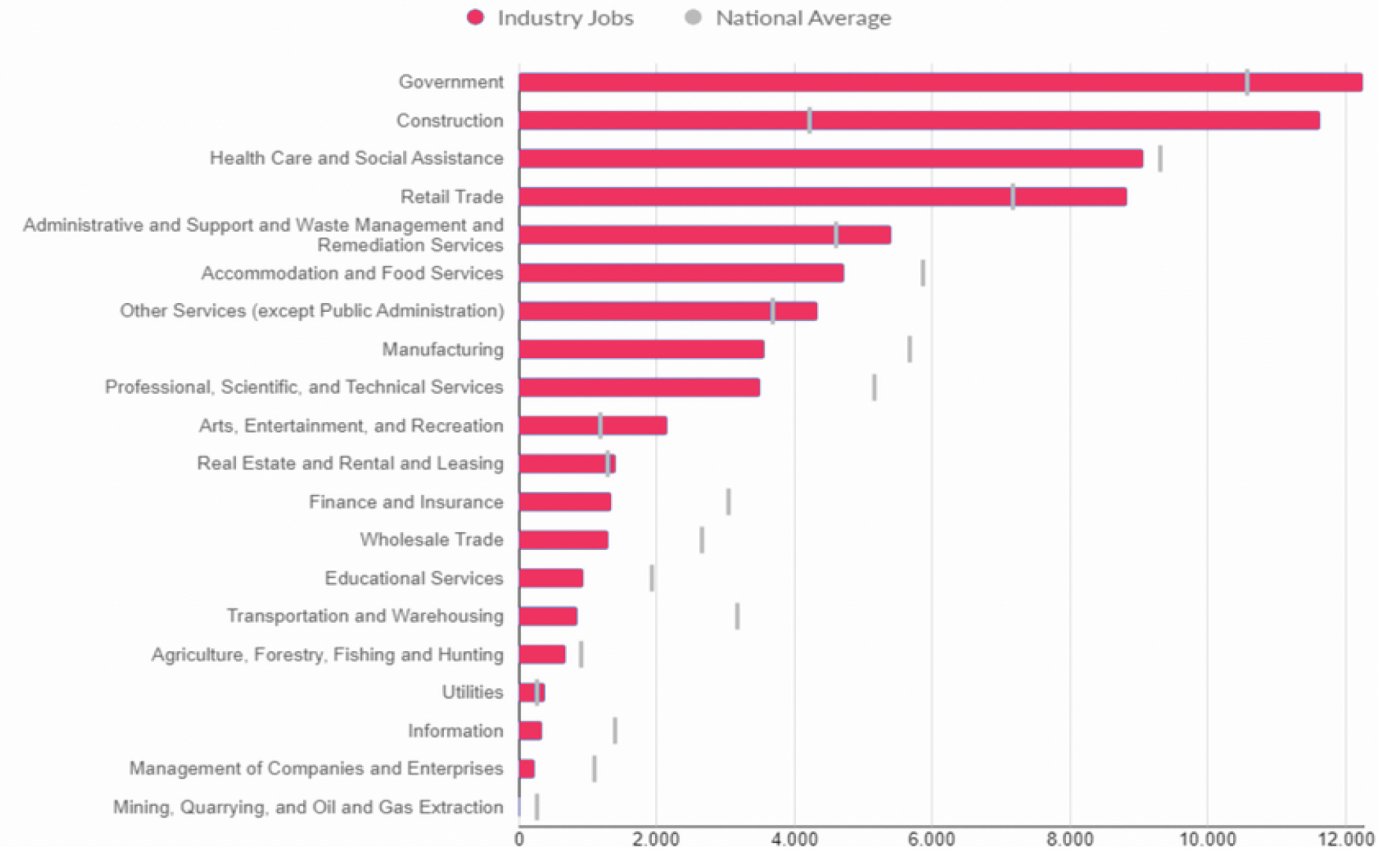
70,978
Emsi, 2022
2022 Employment

26.9%
2019 1 year ACS
Bachelor's Degree Atainment
Adults 25 years or older

$62,319
2018 5-year ACS
Median Household Income

27.5 Minutes
2018 5 year ACS
Average Travel Time to Work

Largest Industries



VISTA

98,381
CA Department of Finance, E5 Estimates
2021 Population

33,311
CA Department of Finance, E5 Estimates
2021 Housing Units

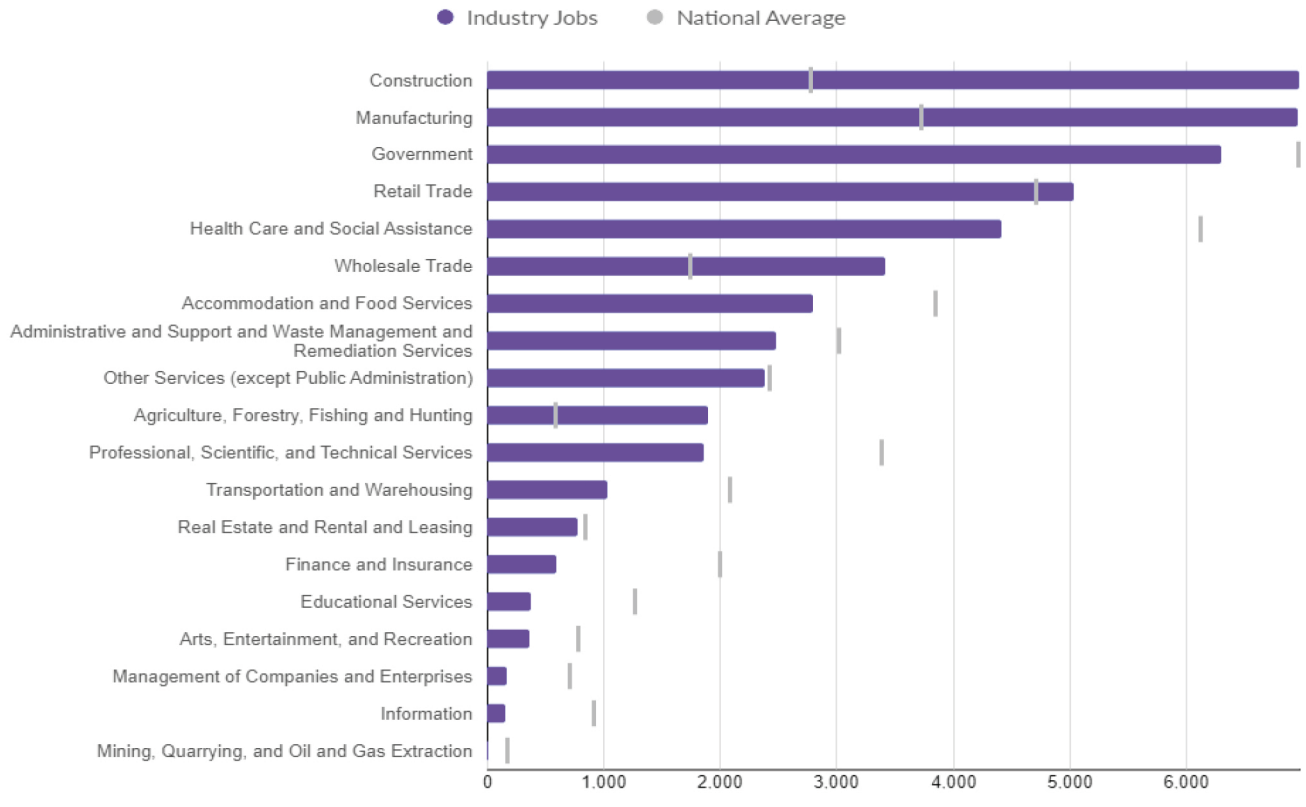
46,993
Emsi, 2022
2022 Employment

22.4%
2019 1 year ACS
Bachelor's Degree Atainment
Adults 25 years or older

$65,695
2018 5-year ACS
Median Household Income

25.8 Minutes
2018 5 year ACS
Average Travel Time to Work

Largest Industries



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