

# NORTH COUNTY INDICATORS 2026

A Data Driven Look At Our  
Region's Economic Health

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# ACKNOWLEDGEMENTS

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San Diego North Economic Development Council would like to thank California State University San Marcos for their continued support of the North County Economic Summit and the North County economy.

This report was authored by W. Erik Bruvold.

# Introduction

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

This is the thirteenth iteration of the NCI. The 2026 North County Indicators includes over 40 indicators and complimentary data sets.

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

We also have included data about the nine incorporated cities in the region.

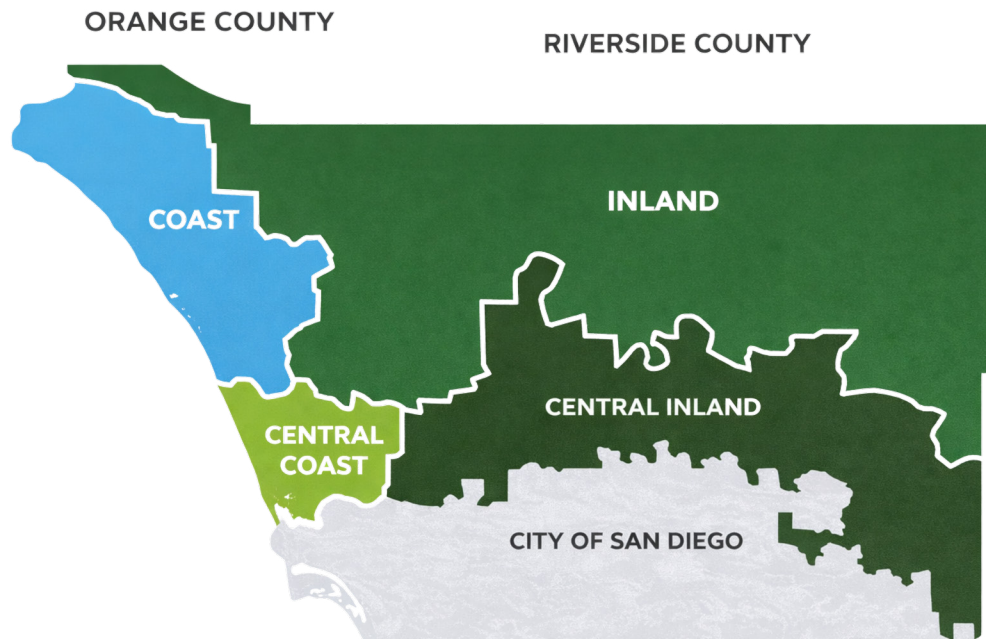
## Help Us Refine the North County Indicators



Take our survey about the 2026 North County Economic Summit and NCI report to help us include the information you really need in future reports.



# San Diego's North County Region



## North County's Jurisdictions and Unincorporated Areas

| COAST  | CENTRAL COAST   | INLAND  | CENTRAL INLAND  |
|--|---|---|---|
| <ul style="list-style-type: none"> <li>• Camp Pendleton</li> <li>• Carlsbad</li> <li>• Oceanside</li> <li>• Vista</li> </ul> | <ul style="list-style-type: none"> <li>• Cardiff by the Sea</li> <li>• Del Mar</li> <li>• Encinitas</li> <li>• Rancho Santa Fe</li> <li>• Solana Beach</li> <li>• San Diego* (partial)</li> </ul> | <ul style="list-style-type: none"> <li>• Bonsall</li> <li>• Borrego Springs</li> <li>• Escondido</li> <li>• Fallbrook</li> <li>• Palomar Mountain</li> <li>• San Marcos</li> <li>• Valley Center</li> </ul> | <ul style="list-style-type: none"> <li>• Julian</li> <li>• Poway</li> <li>• Ramona</li> <li>• San Diego* (partial)</li> </ul> |

\* = Zip Codes 92197, 92129, 92128, 92130

# PEOPLE

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

**Table 1: Population**

| 2025             |            |
|------------------|------------|
| North County     | 1,182,928  |
| San Diego County | 3,282,782  |
| California       | 39,242,785 |

Source: American Community Survey (ACS)

**Table 2: Population in North County’s Incorporated Cities**

| Incorporated City                            | 2025 Population (est.) |
|--|------------------------|
| Carlsbad                                     | 116,368                |
| Del Mar                                      | 3,950                  |
| Encinitas                                    | 61,956                 |
| Escondido                                    | 150,425                |
| Oceanside                                    | 174,340                |
| Poway  | 50,379                 |
| San Marcos                                   | 97,123                 |
| Solana Beach                                 | 12,986                 |
| Vista  | 101,599                |
| <b>Total Incorporated Cities</b>             | <b>769,126</b>         |
| <b>Est. Unincorporated Areas</b>             | <b>201,751</b>         |
| <b>Est. City of San Diego North of SR 56</b> | <b>212,051</b>         |
| <b>Total North County</b>                    | <b>1,182,928</b>       |

Source: JobsEQ/ACS 2019-2024

**Table 3: Change in Population (2020-2025)**

| Region                | Change in Population 2020-2025 | Change in Population |
|-----------------------|--------------------------------|----------------------|
| All San Diego County  | 31,505                         | 0.9%                 |
| 9 North County Cities | 7,781                          | 1%                   |
| California            | -9,122                         | -0.2%                |

Source: California Department of Finance

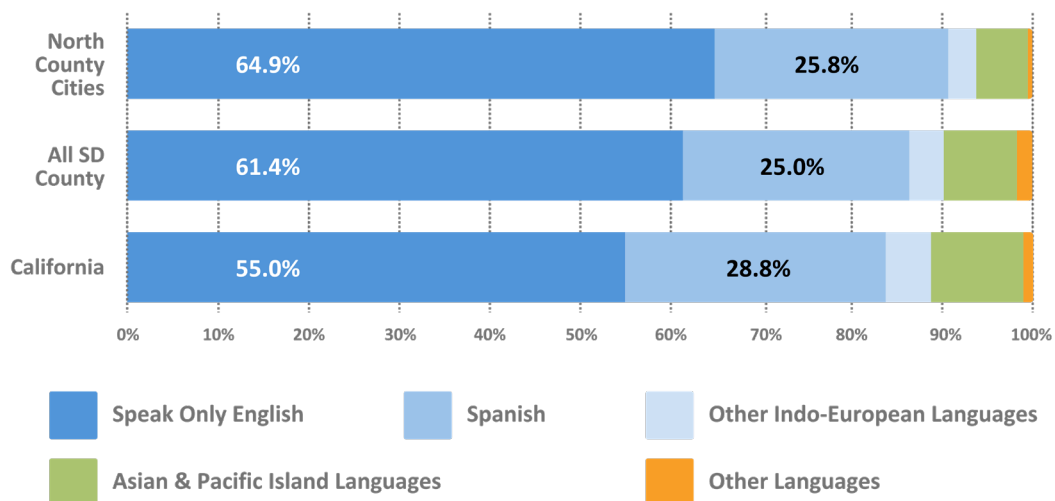
## What the data tells us:

North County’s population has grown 1% since 2020. The combination of high housing prices and an aging population has dampened population gains. Demographic forecasts predict California, San Diego, and North County will essentially have flat population growth over the coming decades.

## Why it matters:

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

**Figure 1: Primary Language Spoken at Home**



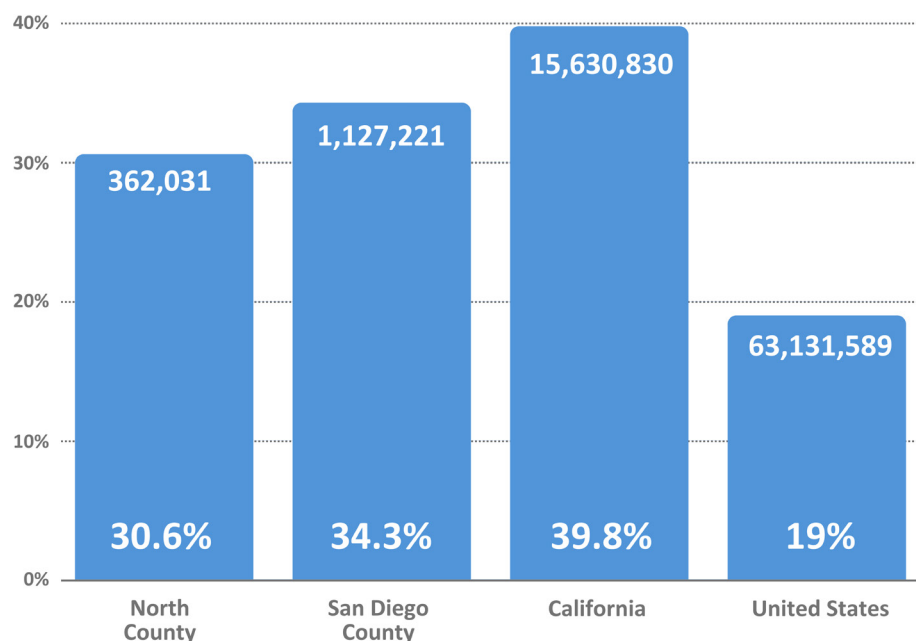
Source: U.S. Census Bureau; American Community Survey

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

| Carlsbad | Encinitas | Escondido | Oceanside | Poway | San Marcos | Vista | California | U.S. |
|----------|-----------|-----------|-----------|-------|------------|-------|------------|------|
| 5%       | 5%        | 19%       | 13%       | 9%    | 12%        | 15%   | 17.8%      | 8.7% |

Source: JobsEQ

**Figure 2: Population Identifying as Hispanic**



Source: JobsEQ

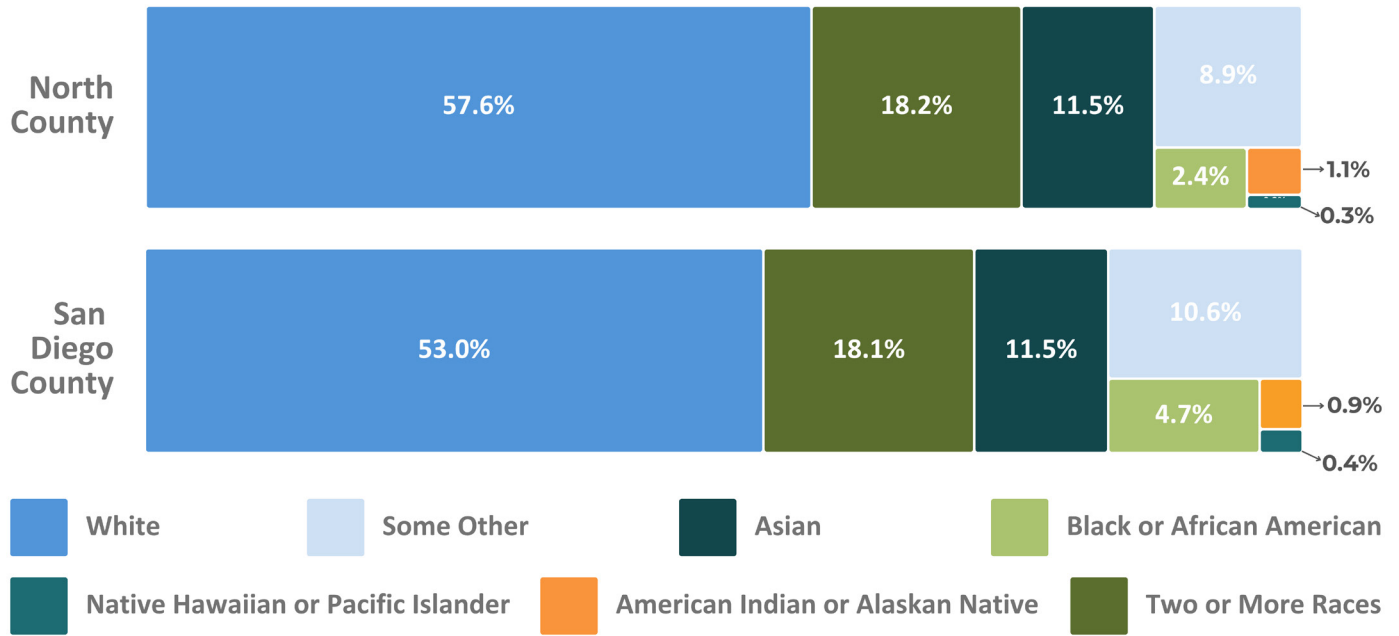
**What the data tells us:**

San Diego's North County has a slightly lower percent of residents who identify as hispanic compared to the entire county.

**Why it matters:**

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

**Figure 3: Racial Composition**



Source: U.S. Census Bureau; ACS

**Table 5: Educational Attainment by City**

|                         | No High School Diploma | High School Graduate | Some College, No Degree | Associate's Degree | Bachelor's Degree | Postgraduate Degree |
|-------------------------|------------------------|----------------------|-------------------------|--------------------|-------------------|---------------------|
| <b>Carlsbad</b>         | 3.7%                   | 8.3%                 | 17.3%                   | 6.6%               | 40.5%             | 23.7%               |
| <b>Del Mar</b>          | 0.4%                   | 3.0%                 | 5.1%                    | 0.9%               | 43.6%             | 47.0%               |
| <b>Encinitas</b>        | 4.5%                   | 7.8%                 | 11.8%                   | 5.7%               | 42.6%             | 27.6%               |
| <b>Escondido</b>        | 19.1%                  | 24.5%                | 20.9%                   | 8.2%               | 18.5%             | 8.8%                |
| <b>Oceanside</b>        | 13.9%                  | 18.9%                | 24.0%                   | 8.8%               | 22.9%             | 11.6%               |
| <b>Poway</b>            | 5.9%                   | 11.9%                | 16.5%                   | 9.5%               | 33.9%             | 22.3%               |
| <b>San Marcos</b>       | 11.7%                  | 15.8%                | 18.3%                   | 9.0%               | 30.4%             | 14.7%               |
| <b>Solana Beach</b>     | 3.1%                   | 9.5%                 | 11.5%                   | 5.3%               | 44.3%             | 26.4%               |
| <b>Vista</b>            | 19.1%                  | 22.5%                | 22.8%                   | 8.9%               | 18.5%             | 8.2%                |
| <b>All of SD County</b> | 10.2%                  | 17.9%                | 20.5%                   | 8.3%               | 27.1%             | 16.1%               |

Source: JobsEQ; ACS

**Table 6: Residents Living & Working in North County (2023)**

| City         | Living & Working in the Same City | Working in Another North County City | Working Outside of North County |
|--------------|-----------------------------------|--------------------------------------|---------------------------------|
| Carlsbad     | 10,180                            | 9,453                                | 25,779                          |
| Encinitas    | 3,597                             | 8,452                                | 12,229                          |
| Escondido    | 11,076                            | 15,194                               | 38,263                          |
| Oceanside    | 12,357                            | 22,186                               | 34,861                          |
| Poway        | 2,335                             | 1,815                                | 14,616                          |
| San Marcos   | 5,408                             | 13,001                               | 22,549                          |
| Vista        | 5,422                             | 15,959                               | 20,585                          |
| <b>Total</b> | <b>50,375</b>                     | <b>86,060</b>                        | <b>168,882</b>                  |

Source: LODS 2023

Note: Employment count may differ from other tables due to differences in LODS methodology; This looks at Primary Jobs only, Defined as the job at which the wage earner makes the most.

**What the data tells us:**

More North County residents work outside of North County than work within it. The most striking issue for this report is that the number of individuals living in one North County city and working in another city is significantly larger than those living and working in the same North County city.



**For more information:**

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

**Table 7: Median Household Income by City (2017-2023)**

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

Source: U.S. Census Bureau; ACS

**What the data tells us:**

One important trend of note is the marked increase in median HH income in communities like Escondido, Vista and San Marcos. The increase in the inland cities reflect increases in housing stock and increased wages among existing residents. inland areas.

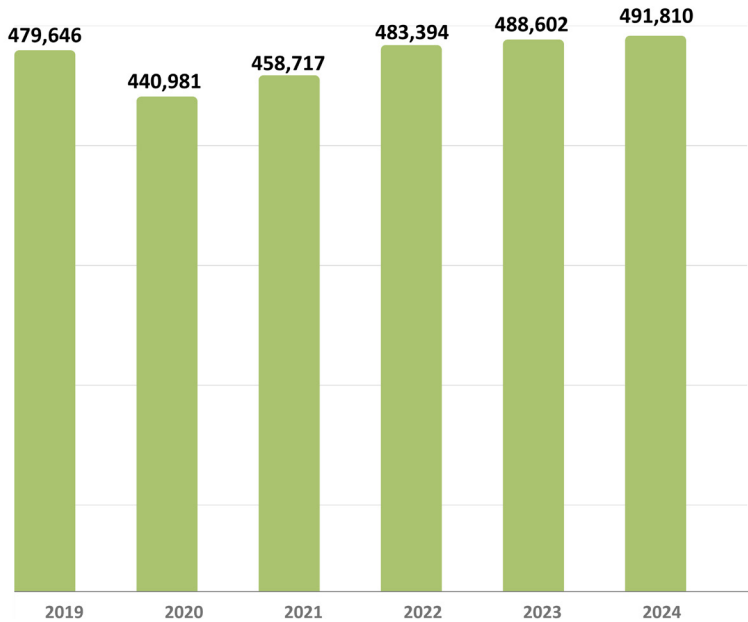
# ECONOMY



North County has a strong, highly diversified economy. Several sectors drive growth, including life sciences, technology, software, defense, advanced manufacturing, and tourism. A robust healthcare, education, and military presence further strengthens the region. Growth has slowed, with the region adding just over 12,000 net jobs between 2019 and 2024. Unemployment remains low, though firms face ongoing difficulty recruiting and retaining key talent.

Federal policy has had an impact. As data on manufacturing and other key innovation sectors shows, uncertainty about trade and other headwinds have led to slight pull backs in those clusters that bring new dollars into the region. Our region's life science cluster has found raising capital to be more challenging - both as a result of higher interest rates and a shift of venture capital toward AI-focused companies. As discussed at the last year's North County Summit, health care and education remain bright spots, adding a significant number of jobs in North County. Spending and procurement priorities in San Diego. As discussed at the 12th Annual Summit, higher education remains a major driver of North County prosperity and is navigating significant changes and challenges.

**Figure 6: Employment Growth in North County (2019-2024)**



Source: JobsEQ

### What is a Cluster Industry?

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

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

**Table 8: Employment in North County by City (2024-2025)**

|              | Unemployment Rate<br>December 2024 | Unemployment Rate<br>December 2025 | Percentage Change Year<br>Over-Year |
|--------------|------------------------------------|------------------------------------|-------------------------------------|
| Carlsbad     | 4.0%                               | 4.0%                               | 0.0%                                |
| Del Mar      | 1.6%                               | 1.8%                               | 0.2%                                |
| Encinitas    | 3.4%                               | 3.5%                               | 0.1%                                |
| Escondido    | 3.9%                               | 4.2%                               | 0.3%                                |
| Oceanside    | 4.1%                               | 4.3%                               | 0.2%                                |
| Poway        | 3.6%                               | 4.2%                               | 0.6%                                |
| San Marcos   | 3.9%                               | 4.0%                               | 0.1%                                |
| Solana Beach | 2.2%                               | 2.3%                               | 0.1%                                |
| Vista        | 4.1%                               | 4.2%                               | 0.1%                                |

Source: JobsEQ

**Table 9: Key Industry Cluster Employment (2019-2024)**

| Cluster                                | Employment 2019 | Employment 2024 | Change in Employment 2019 to 2024 |
|--|-----------------|-----------------|-----------------------------------|
| Biotechnology and Biomed Manufacturing | 21,979          | 21,183          | -796                              |
| Information and Communications         | 22,137          | 21,425          | -712                              |
| Craft Brewing & Beverages              | 3,986           | 3,953           | -33                               |
| Defense & Transportation Technology    | 11,517          | 10,890          | -627                              |
| Healthcare Services                    | 50,558          | 58,988          | 8430                              |
| Software                               | 13,058          | 12,485          | -573                              |
| Tourism & Hospitality                  | 70,998          | 72,179          | 1181                              |

Source: JobsEQ

**What the data tells us:**

Since 2019, health care services and tourism have added a significant number of jobs. In contrast, north county's four key innovation clusters have lost a combined 2,500 jobs since 2019. Craft brewing employment is essentially flat.

**Why it matters:**

North County's economic diversity cushions the region against recession. However, the loss of innovation jobs is of concern, as these clusters are the highest paying in North County and are key drivers of economic prosperity.

**Table 10: Largest Occupations in North County (2025)**

| Occupation   | Employment Q3 2025 | Average Annual Wage | SOCAL Occupational Spotlight |
|--|--------------------|---------------------|------------------------------|
| Fast Food and Counter Workers                          | 13,504             | \$40,100            |                              |
| Personal Care Aides                                    | 11,142             | \$38,200            |                              |
| Retail Salespersons                                    | 10,863             | \$43,700            |                              |
| Cashiers   | 9,853              | \$40,100            |                              |
| General and Operations Managers                        | 8,262              | \$161,900           | X                            |
| Laborers and Freight, Stock, and Material Movers, Hand | 7,750              | \$44,300            |                              |
| Office Clerks, General                                 | 7,722              | \$51,900            |                              |
| Waiters and Waitresses                                 | 7,696              | \$49,300            |                              |
| Software Developers                                    | 7,060              | \$166,100           | X                            |
| Stockers and Order Fillers                             | 6,929              | \$44,500            |                              |

Source: JobsEQ

**Table 11: Occupations with the Greatest Growth (2020-2025)**

| Occupation   | 5 Year Change in Employment (2020-2025) | Average Annual Wage | SOCAL Occupational Spotlight |
|--|---|---------------------|------------------------------|
| Personal Care Aides  | 4,147                                   | \$38,200            |                              |
| Fast Food and Counter Workers                                  | 1,976                                   | \$40,100            |                              |
| General and Operations Managers                                | 1,592                                   | \$161,900           | X                            |
| Managers, All Other  | 1,454                                   | \$182,100           | X                            |
| Cooks, Restaurant  | 1,246                                   | \$46,200            |                              |
| Waiters and Waitresses   | 1,092                                   | \$49,300            |                              |
| Laborers and Freight, Stock, and Material Movers, Hand         | 924                                     | \$44,300            |                              |
| Registered Nurses  | 923                                     | \$146,600           | X                            |
| Stockers and Order Fillers                                     | 910                                     | \$44,500            |                              |
| Project Management Specialists                                 | 853                                     | \$121,000           | X                            |
| First-Line Supervisors of Food Preparation and Serving Workers | 835                                     | \$49,500            |                              |

Source: JobsEQ

**Table 12: Occupations with the Greatest Decline (2020-2025)**

| Occupation  | 5 Year Change in Employment (2020-2025) | Average Annual Wage |
|---|---|---------------------|
| Executive Secretaries and Executive Administrative Assistants | -1,051                                  | \$87,600            |
| Computer Programmers  | -456                                    | \$133,000           |
| Helpers--Production Workers                                   | -276                                    | \$49,800            |
| Bookkeeping, Accounting, and Auditing Clerks                  | -245                                    | \$60,800            |
| Chief Executives  | -228                                    | \$293,200           |
| Tellers   | -228                                    | \$47,000            |
| Farmers, Ranchers, and Other Agricultural Managers            | -224                                    | \$116,900           |
| Bill and Account Collectors                                   | -215                                    | \$56,200            |
| Sales Representatives, Wholesale and Manufacturing            | -210                                    | \$89,000            |
| Loan Officers   | -200                                    | \$98,900            |
| Telemarketers   | -191                                    | \$42,400            |

Source: JobsEQ

### Explanation of Clusters

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

1- They involve firms cooperating and competing, often leveraging social ties and relationships to create competitive advantage. For Example, North County's craft brewing industry thrives on a tight-knit community. Brewers and leaders frequently collaborate, sharing intertwined work experiences throughout their careers.

2- Clusters typically sell a substantial portion of their goods and services outside their region, driving economic growth by bringing in new revenue.

# EDUCATION

STEM education remains a critical engine of prosperity as the fastest growing occupations with the highest wages requiring at least a 2 and usually a 4 year college degree . This years indicators again reports out on statistics on Math and English proficiency in different North County school districts. While progress is evident, the data suggests that some districts still need additional support.

**Table 13: CAASPP Math & English Proficiency\*\* (2024-2025)**

| District                   | Language Arts Proficient | Math Proficient |
|----------------------------|--------------------------|-----------------|
| Bonsall Unified            | 52.6%                    | 40.3%           |
| Carlsbad Unified           | 70.8%                    | 61.6%           |
| Classical Academy          | 66.4%                    | 54.0%           |
| Escondido Charter High     | 73.8%                    | 50.0%           |
| Escondido Union Elementary | 36.6%                    | 29.7%           |
| Escondido Union High       | 55.4%                    | 20.7%           |
| Oceanside Unified          | 42.2%                    | 31.8%           |
| Poway Unified              | 73.7%                    | 66.4%           |
| San Dieguito Union High    | 79.9%                    | 68.5%           |
| San Marcos                 | 57.3%                    | 46.5%           |
| Vista Unified              | 44.2%                    | 33.9%           |

\*California Assessment of Student Performance and Progress (CAASPP).

\*\*Proficiency defined as meeting or exceeding state standards. Source: Ed-Data

**What the data tells us:**

North County has a higher percentage of residents with Bachelor and post-graduate degrees than the rest of San Diego County (47.2% vs. 43.2%). High educational achievement is a competitive strength that helps attract and retain high-skill, high-wage industries.

**Why it matters:**

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

**Table 14: Degrees awarded from Key North County Institutions of Higher Education**

| District                   | Language Arts Proficient | Math Proficient |
|----------------------------|--------------------------|-----------------|
| Bonsall Unified            | 52.6%                    | 40.3%           |
| Carlsbad Unified           | 70.8%                    | 61.6%           |
| Classical Academy          | 66.4%                    | 54.0%           |
| Escondido Charter High     | 73.8%                    | 50.0%           |
| Escondido Union Elementary | 36.6%                    | 29.7%           |
| Escondido Union High       | 55.4%                    | 20.7%           |
| Oceanside Unified          | 42.2%                    | 31.8%           |
| Poway Unified              | 73.7%                    | 66.4%           |
| San Dieguito Union High    | 79.9%                    | 68.5%           |
| San Marcos                 | 57.3%                    | 46.5%           |
| Vista Unified              | 44.2%                    | 33.9%           |

Source: JobsEQ

# PLACE

**Table 15: Regional Average Commute Times (2023)**

| Region              | Commute Time In Minutes (2023) |
|---------------------|--------------------------------|
| All of North County | 26.9                           |
| California          | 29                             |
| San Diego County    | 25.9                           |

Sources: JobsEQ; ACS

**What the data tells us:**

The pandemic fundamentally altered commuting patterns, with remote and hybrid work becoming much more common. While “Return to Work” policies have received significant press attention, we see work from home being a continued defining characteristic of many North County cities.

**Why it matters:**

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

**Table 16: Commute Via Public Transit and Work from Home**

| City                    | Workers using Public Transit as primary means of commuting | Workers who work from home 3 or more days a week |
|-------------------------|--|--|
| Carlsbad                | 0.8%   | 29.0%  |
| Encinitas               | 0.6%   | 28.7%  |
| Escondido               | 1.5%   | 12.8%  |
| Oceanside               | 2.1%   | 14.8%  |
| Poway                   | 1.0%   | 20.2%  |
| San Marcos              | 0.5%   | 18.7%  |
| Vista                   | 1.0%   | 13.2%  |
| All of North County     | 1.0%   | 18.8%  |
| All of San Diego County | 2.2%   | 16.9%  |

Source: JobsEQ; American Community Survey

**Table 17: Change in Remote Work (2021-2023)**

| Year | Percentage of North County Workers who work from home 3 or more days a week |
|------|---|
| 2021 | 13.7%   |
| 2022 | 16.7%   |
| 2023 | 18.8%   |

Source: JobsEQ

**Table 18: Housing Costs As Percentage Of Gross Income (2024)**

| City       | Percentage of Households with Mortgages paying more than 30% of income | Percentage of Households with Mortgages paying more than 50% of income | Percentage of Renters paying more than 30% of income in Rent | Percentage of Renters paying more than 50% of income in Rent |
|------------|--|--|--|--|
| Carlsbad   | 34.1%  | 17.2%  | 52.5%  | 26.1%  |
| Escondido  | 33.8%  | 15.3%  | 51.1%  | 25.9%  |
| Oceanside  | 37.4%  | 16.9%  | 54.8%  | 29.3%  |
| San Marcos | 37.6%  | 17.0%  | 66.0%  | 41.3%  |
| Vista      | 28.0%  | 11.5%  | 56.1%  | 30.9%  |

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

**What the data tells us:**

Measuring the ratio of net new jobs to new housing is a clear and easy way to understand the balance between the demand for housing and the supply on the market. North County, like much of the region, has struggled with this ratio, in some years ceating up to 4 new jobs for every 1 new home.

**Why it matters:**

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

**Table 19: Zillow Home Values 2022-2025**

| City         | 2022        | 2023        | 2024        | 2025        |
|--------------|-------------|-------------|-------------|-------------|
| Carlsbad     | \$990,136   | \$1,080,371 | \$1,187,979 | \$1,258,381 |
| Del Mar      | \$3,041,153 | \$3,265,500 | \$3,514,971 | \$3,551,703 |
| Encinitas    | \$1,519,613 | \$1,623,282 | \$1,732,985 | \$1,811,243 |
| Escondido    | \$713,680   | \$756,495   | \$814,500   | \$845,524   |
| Oceanside    | \$716,714   | \$766,728   | \$825,563   | \$862,541   |
| Poway        | \$988,150   | \$1,049,153 | \$1,160,733 | \$1,230,003 |
| San Marcos   | \$801,614   | \$848,301   | \$909,581   | \$945,718   |
| Solana Beach | \$1,719,082 | \$1,849,141 | \$1,973,468 | \$2,068,345 |
| Vista        | \$712,164   | \$759,855   | \$825,742   | \$863,352   |

Source: Zillow 2022-2025

**Table 20: Jobs to Housing Balance (2015-2025)**

| City / Region                 | 2015 Jobs to Housing Ratio | New Payroll Jobs 2015 to 2025 | Housing Units Added | Net New Jobs to Net New Housing Ratio | Units short from maintaining 2015 ratio |
|-------------------------------|----------------------------|-------------------------------|---------------------|---------------------------------------|---|
| Carlsbad                      | 1.64                       | 7,573                         | 2,878               | 2.63                                  | 1734                                    |
| Encinitas                     | 1.05                       | 2,284                         | 1,092               | 2.09                                  | 1090                                    |
| Escondido                     | 1.04                       | 8,454                         | 2,187               | 3.87                                  | 5930                                    |
| Oceanside                     | 0.69                       | 7,028                         | 3,430               | 2.05                                  | 6702                                    |
| San Marcos                    | 1.27                       | 5,936                         | 3,031               | 1.96                                  | 1660                                    |
| Vista                         | 1.40                       | 2,091                         | 2,860               | 0.73                                  | -1371                                   |
| 6 Largest North County Cities | 1.15                       | 33,366                        | 15,478              | 2.16                                  | 15746                                   |
| County of San Diego           | 1.15                       | 167,961                       | 78,979              | 2.13                                  | 67074                                   |

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



# Reference Sheets for the nine Incorporated North County Cities

Reference Sheets for the nine Incorporated North County Cities

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

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



## The Latest City Data at Your Fingertips

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



# CARLSBAD

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



**116,368**

CA Department of Finance, E5 Estimates

2025 Population



**48,888**

CA Department of Finance, E5 Estimates

2025 Housing Units



**83,130**

JOBSeq (2025)

2025 Employment



**64.2%**

JOBSeq (2025)

Bachelor's Degree or Higher



**\$139,326**

JOBSeq (2025)

Median Household Income



**28.0** Minutes

JOBSeq (2025)

Average Travel Time to Work

# DEL MAR

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



CA Department of Finance, E5 Estimates

**3,950**

2025 Population



CA Department of Finance, E5 Estimates

**2,641**

2025 Housing Units



JOBSeq (2025)

**3,411**

2025 Employment



JOBSeq (2025)

**90.6%**

Bachelor's Degree or Higher



JOBSeq (2025)

**\$192,845**

Median Household Income



JOBSeq (2025)

**22.4 Minutes**

Average Travel Time to Work

# ENCINITAS

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



CA Department of Finance, E5 Estimates

**61,956**

2025 Population



CA Department of Finance, E5 Estimates

**27,118**

2025 Housing Units



JOBSeq (2025)

**29,521**

2025 Employment



JOBSeq (2025)

**70.2%**

Bachelor's Degree or Higher



JOBSeq (2025)

**\$150,471**

Median Household Income



JOBSeq (2025)

**23.8 Minutes**

Average Travel Time to Work

# ESCONDIDO

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



CA Department of Finance, E5 Estimates

**150,425**

2025 Population



CA Department of Finance, E5 Estimates

**50,883**

2025 Housing Units



JOBSeq (2025)

**59,173**

2025 Employment



JOBSeq (2025)

**27.3%**

Bachelor's Degree or Higher



JOBSeq (2025)

**\$84,477**

Median Household Income



JOBSeq (2025)

**28.1** Minutes

Average Travel Time to Work

# OCEANSIDE

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



CA Department of Finance, E5 Estimates

**174,340**

2025 Population



CA Department of Finance, E5 Estimates

**69,097**

2025 Housing Units



JOBSeq (2025)

**52,576**

2025 Employment



JOBSeq (2025)

**34.5%**

Bachelor's Degree or Higher



JOBSeq (2025)

**\$93,724**

Median Household Income



JOBSeq (2025)

**29.5** Minutes

Average Travel Time to Work

# POWAY

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



CA Department  
of Finance, E5  
Estimates

**50,379**

2025 Population



CA Department  
of Finance, E5  
Estimates

**17,773**

2025 Housing Units



JOBSeq (2025)

**34,382**

2025 Employment



1-year ACS  
(2025)

**56.4%**

Bachelor's Degree or Higher



JOBSeq (2025)

**\$143,825**

Median Household Income



JOBSeq (2025)

**24.6** Minutes

Average Travel Time to Work

# SAN MARCOS

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



CA Department  
of Finance, E5  
Estimates

**93,123**

2025 Population



CA Department  
of Finance, E5  
Estimates

**33,157**

2025 Housing Units



JOBSeq (2025)

**44,056**

2025 Employment



JOBSeq (2025)

**45.1%**

Bachelor's Degree or Higher



JOBSeq (2025)

**\$105,286**

Median Household Income



JOBSeq (2025)

**27.1** Minutes

Average Travel Time to Work

# SOLANA BEACH

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



CA Department of Finance, E5 Estimates

**12,986**

2025 Population



CA Department of Finance, E5 Estimates

**6,736**

2025 Housing Units



JOBSeq (2025)

**8,977**

2025 Employment



JOBSeq (2025)

**70.7%**

Bachelor's Degree or Higher



JOBSeq (2025)

**\$150,820**

Median Household Income



JOBSeq (2025)

**21.9** Minutes

Average Travel Time to Work

# VISTA

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



CA Department of Finance, E5 Estimates

**101,599**

2025 Population



CA Department of Finance, E5 Estimates

**34,384**

2025 Housing Units



JOBSeq (2025)

**38,671**

2025 Employment



JOBSeq (2025)

**26.7%**

Bachelor's Degree or Higher



JOBSeq (2025)

**\$91,854**

Median Household Income



JOBSeq (2025)

**26.6** Minutes

Average Travel Time to Work

# 2026 Benefits of Investment

| BENEFITS   | CHAIRMAN'S CIRCLE<br>\$10,000                        | REGIONAL STEWARD<br>\$5,000     | CORPORATE<br>INVESTOR<br>\$2,750** |
|--|--|---------------------------------|------------------------------------|
| Invitation to specialized briefings with local elected officials | X  |                                 |                                    |
| Opportunity for a guest article in SDNEDC newsletter*            | X  |                                 |                                    |
| Logo recognition featured at all events                          | X  | X                               |                                    |
| North County Economic Summit & Annual Awards Luncheon            | Complimentary Table of 10 to each                    | 2 Complimentary Tickets to each |                                    |
| Annual Study Trip  | Priority Invitation & Special Pricing                | Priority Invitation             |                                    |
| Team Member Highlighted on www.socalworkforce.org                | 1 Complimentary every 2 years                        | Cost of Videography             |                                    |
| Banner Ad placement in SDNEDC newsletter*                        | 2 times a year                                       | Once a year                     |                                    |
| Investor spotlight in SDNEDC newsletter                          | Featured Placement                                   | Featured Placement              | X                                  |
| Specialized Economic Research Services                           | 8 Hours Annually + Economic Impact Report            | 4 Hours Annually                | Discounted Hourly Rate             |
| Behind the Scenes Tours  | Opportunity to Host & Priority Opportunity to attend | Priority Opportunity to Attend  | Rotating Invitation                |
| Invitation to All Chairman's Dinners                             | X<br>(Complimentary Admission)                       | X                               | Rotating Invitation                |
| Opportunity to serve on Board & Committees                       | X  | X                               | Rotating Invitation                |
| Invitation to Quarterly Real Estate Luncheons                    | X  | X                               | Rotating Invitation                |
| Member-only data quarterly Economic Indicators                   | X  | X                               | X                                  |
| Priority business referrals                                      | X  | X                               | X                                  |
| Logo recognition on SDNEDC website                               | X  | X                               | X                                  |
| Promotion across social media platforms                          | X  | X                               | X                                  |
| Members-only pricing at all events                               | X  | X                               | X                                  |
| Invitation to investor appreciation events                       | X  | X                               | X                                  |

\*Subject to newsletter editor approval

\*\* Discounted to \$600 for North-county based small business with <15 employees or 501(c)(3) non-profits with less than \$2M in revenue

**For more information, please contact SDNEDC CEO W. Erik Bruvold at 760-205-5841 or ebruvold@sdnedc.org**

*SDNEDC offers a range of research services designed to support data-driven decision-making. For Regional Stewards and Chairman's Circle members, select services are provided as part of their investment.*



## **Economic Impact Reports**

Chairman's Circle investors receive a complimentary Economic Impact Report as part of their membership. For non-members, report scope and delivery are customized based on presentation needs and whether design services are provided by SDNEDC's in-house graphics team.



## **Customized Economic Datasheets**

Similar to our "City Dashboards," SDNEDC can compile comprehensive census tract-level data on demographic and economic trends. Reports are tailored to your specific needs, with scope determined by the depth and number of data points requested.



## **Real Time Labor Data**

Access current labor market insights, including job postings, median advertised wages, required skills and certifications, and top employers hiring across a wide range of occupations. Data can be segmented by county, city, or occupation to provide targeted insights.



## **Geofencing Data**

Work with SDNEDC to develop customized reports using cell phone location data to better understand visitor and workforce behavior. Gain insights into where individuals are coming from, how they move throughout the region, and key patterns relevant to your business or project.



## **Marketing Lists**

SDNEDC compiles targeted lists of companies across North County by industry cluster to support outreach, business development, and strategic engagement efforts.



## **Customized Research**

SDNEDC staff brings over 50 years of combined experience in economic development and market research. Our team taps into diverse data sources and regional expertise to support your specific research needs. For more information or to discuss a project, contact Erik at [ebruvold@sdnedc.org](mailto:ebruvold@sdnedc.org).

# NEWSLETTER

Get real-time insights, data, and updates shaping our region.

## North County Pulse

North County Pulse is SDNEDC's weekly newsletter that delivers timely, data-driven insights on the trends, industries, and decisions shaping North County's economy - so you stay informed, prepared, and ahead.



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San Diego North  
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Council (SDNEDC)



## MARKET

Attracting new investment and telling North County's story

## RETAIN

Supporting local businesses and solving regional challenges

## CONNECT

Bridging employers, educators, and workforce pipelines

