



2020

**CALIFORNIA 49TH
CONGRESSIONAL
DISTRICT**

Economic Overview



RESEARCH CONDUCTED BY:

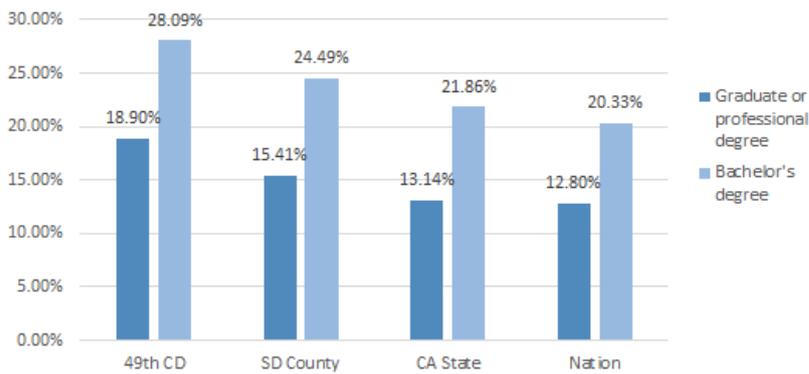


San Diego North Economic
Development Council

ABOUT THE 49TH CONGRESSIONAL DISTRICT

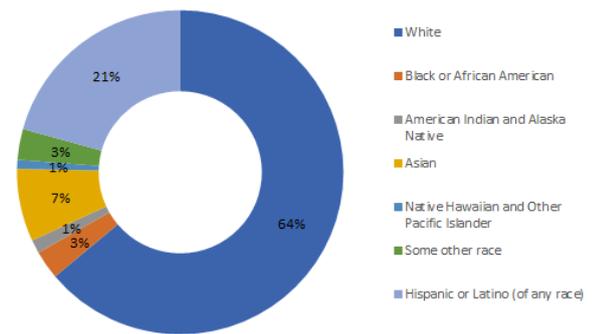
The 49th Congressional district covers the northern coastal areas of San Diego County, including Oceanside, Vista, Carlsbad, and Encinitas, and Marine Corps Base Camp Pendleton. A portion of southern Orange County is also included in the district, covering San Clemente, Dana Point, San Juan Capistrano, Ladera Ranch, and Coto de Caza.

Educational Attainment Over 25



Source: 2019 ACS 1 Year Estimate

Demographics by Ethnicity

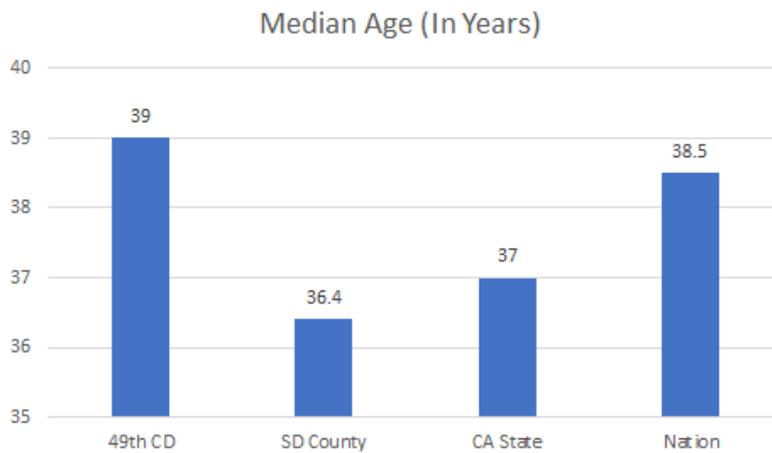


Source: 2019 ACS 1 Year Estimate

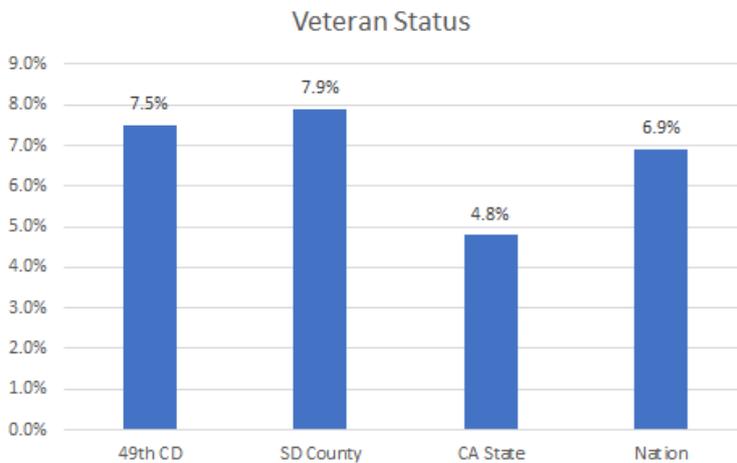
The 49th Congressional district in California is one of the most highly educated districts in the country, with nearly half (47%) of the residents age 25 and older holding a college degree and one in five holding a masters, doctorate, or advanced professional degree.

This is significantly higher than the rest of San Diego County, California, or the nation. It is a core underlying strength of the district, having a dramatic impact on the kind of companies that gain a competitive advantage being in the 49th.

ABOUT THE 49TH CONGRESSIONAL DISTRICT



Source: 2019 ACS 1 Year Estimate



Source: 2019 ACS 1 Year Estimate

The 49th district's median age is slightly older than the rest of the county and the state. This likely reflects the impact of high housing prices in the district, with disproportionately fewer young families than other parts of the region. Nearly 1 out of every 11 adults in the district is a veteran. That is slightly higher than the county and significantly higher than California. Congressional representatives from both sides of the aisle in the 49th have long focused on veteran affairs— reflecting both the makeup of the district and the vital importance of providing for those who served our country.





ECONOMIC SECTORS IN THE 49TH DISTRICT

INFORMATION TECHNOLOGY & COMMUNICATION



13,835 Jobs

2019
Employment



18.8%

Percentage Change
Since 2014



1.18

Concentration
Compared to
the US**



\$138,620

Average Earnings
Per Job*

Touching on the Data

The 49th has large ITC firms like Viasat (one of the largest private sector employers in the district) and small firms, such as a cluster of game developers concentrated in Carlsbad. The growth of the sector has been impressive, outpacing the nation and the county as a whole since 2014 and earnings are significantly higher than the district's median.

BIOTECHNOLOGY & BIOMEDICAL DEVICES



21,257 Jobs

2019
Employment



7.8%

Percentage Change
Since 2014



4.06

Concentration
Compared to
the US**



\$136,288

Average Earnings
Per Job*

Touching on the Data

There is a significant concentration of biomedical device companies in the 49th. Whereas the life science cluster in Torrey Pines is dominated by firms focused on early and mid-stage research, in the 49th one finds companies further up the value chain such as Thermo Fisher in Carlsbad or the medical device and biomanufacturing clusters in Oceanside and Vista.

*Average Earnings are equal to wages, benefits, other compensation, or in the case of owners, profits derived from the business. This should be used as a measure of wage "quality" across industry clusters but are not equivalent to average wage

DEFENSE & TRANSPORTATION MANUFACTURING



3,037 Jobs

2019
Employment



19.4%

Percentage Change
Since 2014



0.54

Concentration
Compared to
the US**



\$152,002

Average Earnings
Per Job*

Touching on the Data

This sector has very high average per employee earners but is generally underrepresented compared to the rest of the nation and San Diego company (54% of the jobs we would expect in an economy as that found in the 49th.)

CONSTRUCTION, BUILDING, & DESIGN



34,942 Jobs

2019
Employment



25.2%

Percentage Change
Since 2014



1.30

Concentration
Compared to
the US**



\$78,014

Average Earnings
Per Job*

Touching on the Data

Showing more than a 25% growth rate since 2014, this sector has been fueled not only by a strong growth in construction jobs but also the emergence of a cluster of housing developers, design firms, and architecture offices around Encinitas and Solana Beach – reflecting both proximity to the residents of principals as well as opportunity to find flexible and unique office space for these uses.

** Concentration (or Location Quotient) is a measure of relative size of the industry cluster compared to the nation as a whole. If 1.0 it is the same as the nation. A concentration under 1.0 means that there are proportionately fewer jobs in this cluster in the district than the nation. A concentration value over 1.0 can be read as the sector being underrepresented compared to the nation. In the case of ITC, a value of 1.18 means that the sector has 18% more jobs than what we would expect if the district was the same as the nation as a whole. In the case of Biotechnology, it means that there are proportionately 4 times more jobs in the 49th than the rest of the district..

TOURISM AND HOSPITALITY



53,031 Jobs

2019
Employment



16.5%

Percentage Change
Since 2014



1.19

Concentration
Compared to
the US**



\$32,317

Average Earnings
Per Job*

Touching on the Data

Though average earnings are not high, a significant number of people in the 49th are employed in the tourism and hospitality sector. Unlike downtown San Diego, which has a significant meeting and convention business, most tourism in the 49th involves leisure travel and much of that from areas within a one-day drive. Many individuals gain valuable work experience in the sector and its flexibility and hours often provide valuable part-time work opportunities.

HEALTHCARE



33,159 Jobs

2019
Employment



18.3%

Percentage Change
Since 2014



0.68

Concentration
Compared to
the US**



\$66,493

Average Earnings
Per Job*

Touching on the Data

Healthcare employs more than 33,000 individuals in the 49th district and is home to 2 major public sector hospitals as well as the naval hospital on Camp Pendleton. This sector is somewhat underrepresented (an LQ of .68) compared to the rest of the nation, reflecting that major medical systems such as Sharp, UCSD, Palomar, and Kaiser serve patients in the 49th but their facilities are located just outside of the district.

BREWERS & CRAFT BEVERAGES



3,193 Jobs

2019
Employment



54.3%

Percentage Change
Since 2014



1.25

Concentration
Compared to
the US**



\$42,073

Average Earnings
Per Job*

Touching on the Data

One of the more exciting clusters in the district is the Craft Beer and Beverage sector. It has grown by more than 54% since 2014 and has a 25% greater concentration than the district as a whole. One of the limiting factors in the industry's growth remain a myriad of regulatory and distribution constraints that limit the ability of the majority of small brewers to expand beyond the local market.

SPORT AND ACTIVE LIFESTYLE



9,758 Jobs

2019
Employment



1.43%

Percentage Change
Since 2014



1.91

Concentration
Compared to
the US**



\$52,297

Average Earnings
Per Job*

Touching on the Data

The district has long been home to sports manufacturers such as Taylor Made Golf and a growing set of clothing designers and manufacturers in the surf and active lifestyle space. The sector has only grown by 1.4% since 2014. In large part, this reflects the relatively low margins of many of the sectors in this cluster, the impact of globalized competition, and the challenges of doing business in relatively high-cost California.