

CITY OF SAN MARCOS COMMUNITY PROFILE

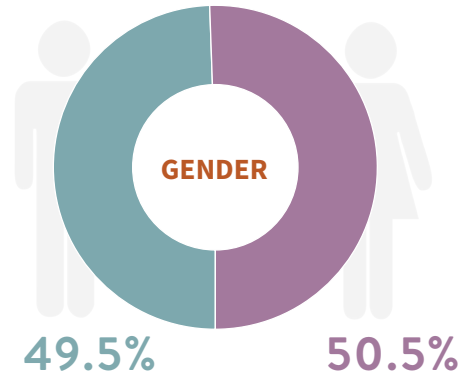
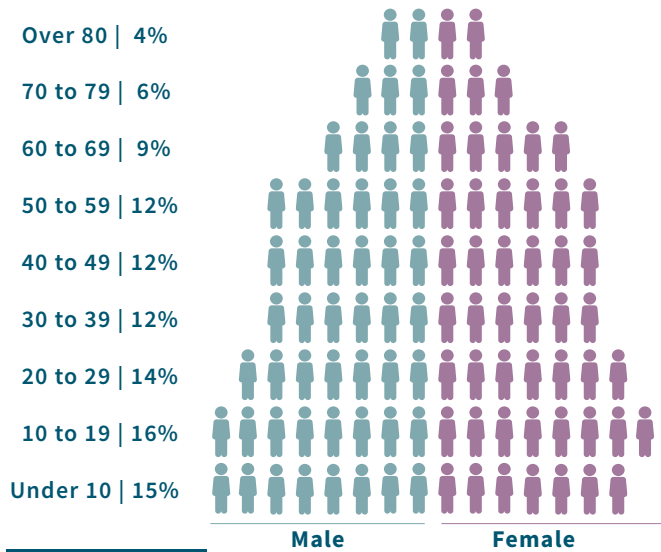


SAN MARCOS
DISCOVER LIFE'S POSSIBILITIES

PART 1: DEMOGRAPHICS POPULATION

AT A GLANCE

With a population of **95,768**, San Marcos has the smallest, yet fastest, growing population along the 78 Corridor. The city's population has grown by more than 14 percent since 2010, outpacing the other four cities along the Corridor by at least four percent.



Source: SANDAG Estimate, 2018

AGE BREAKDOWN

The city's median age of **34.4** matches Escondido for the second youngest along the 78 Corridor. Similar to the region, the city's median age has remained relatively stable, hovering near 33 years with only slight fluctuations each year.

The largest share of the city's population — 16 percent — is between 10 and 19 years old. San Marcos has seen the greatest changes in population among those that are young, age 10 to 19, increasing by 21 percent since 2010, and among those 60+, growing 33 percent since 2010.

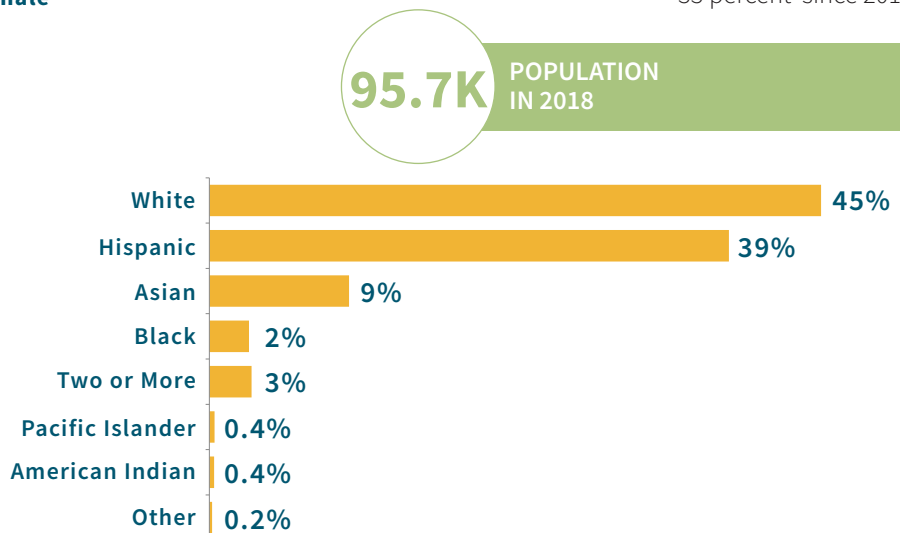
~ 1% of Total POP

Source: SANDAG Estimate, 2018

RACE & ETHNICITY

Similar to the region as a whole, San Marcos is a majority-minority city, meaning that no single race or ethnic groups comprises more than 50 percent of the total population.

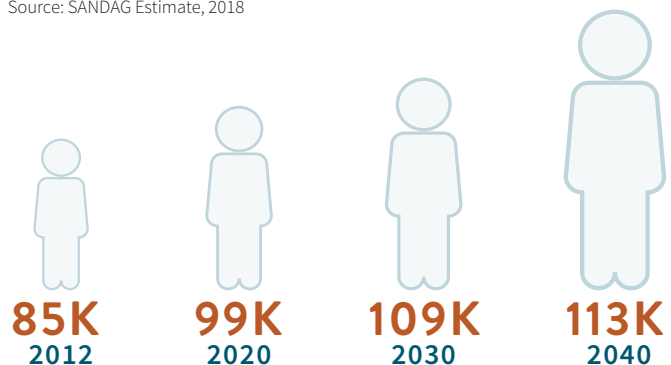
In 2018, **45 percent** of the city's population was White, with another **39 percent** being Hispanic. Although this split closely resembles the region, San Marcos has a slightly lower percentage — 0.8 percentage points — of Whites and a higher percentage — 5.4 percentage points — of Hispanics.



Source: SANDAG Estimate, 2018

POPULATION GROWTH TRENDS

Since 2012, the city's population has grown by an average of **1,670** people per year — approximately 1.7 percent each year. Looking forward, the city's population is projected to grow by an additional 9 percent — approximately 12,130 people — by 2025.



Source: SANDAG Forecast, 2012-2040

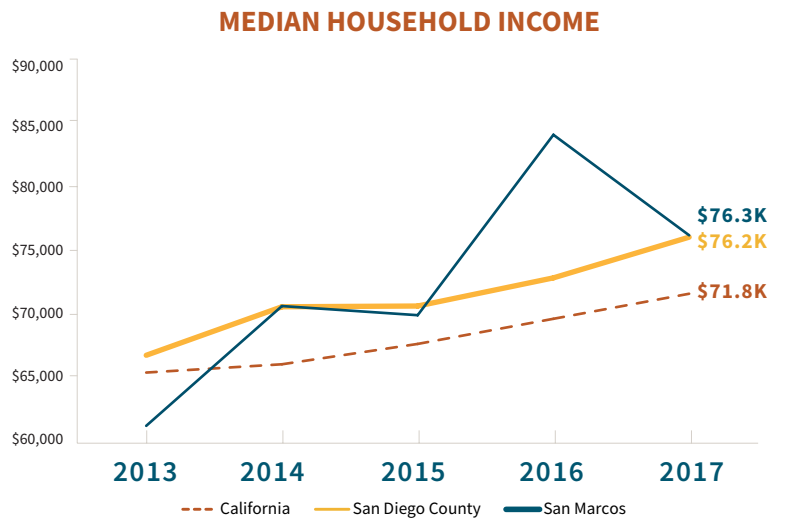
AVERAGE ANNUAL GROWTH RATE
SINCE 2012

1.7%

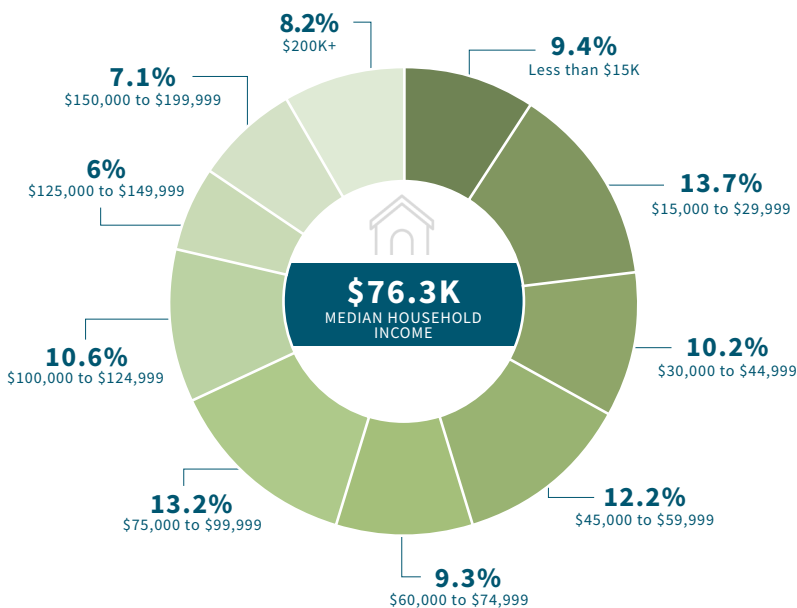
MEDIAN HOUSEHOLD INCOME

With a median household income of **\$76,272**, San Marcos has the second highest median household income along the 78 Corridor.

AVERAGE ANNUAL MEDIAN HOUSEHOLD INCOME GROWTH SINCE 2011 **\$4.4K**



Source: ACS 1-year estimate, 2017
Note: Figures in 2017 adjusted dollars.



Source: SANDAG Estimate, 2018

INCOME GROUPS

In 2017, approximately 45.5 percent of households made less than \$60,000, with the remaining 54.5 percent earning more than \$60,000.

29.9K HOUSEHOLDS IN 2018

POVERTY STATISTICS

Poverty thresholds are defined by the federal government and vary by family size. In 2017, the poverty threshold for a family of four was \$24,858.

San Marcos has an overall poverty rate of **9.1 percent** which is less than the state average of 13.3 percent, and the county rate of 11.8 percent.

SHARE OF POPULATION LIVING IN POVERTY

	San Marcos	San Diego County	California	
BY AGE	Under 18 years	8.1%	15.7%	18.1%
	18 to 34 years	16.4%	14.5%	14.8%
	35 to 64 years	4.7%	8.9%	10.6%
	65 years +	10.3%	8.6%	10.2%
BY EDUCATIONAL ATTAINMENT*	Less than high school graduate	9.1%	11.8%	13.3%
	High school graduate	5.9%	20%	21.6%
	Some college	12%	13%	13.8%
	Bachelor's degree +	7.1%	4.8%	5%

Source: ACS 1-year estimates, 2017
*Data refers to portion of the population 25 or higher.

PART 2: SOCIOECONOMICS EDUCATIONAL ATTAINMENT

TALENTED WORKFORCE

San Marcos is home to a talented, diverse and well-educated workforce. Educational attainment in the city exceeded 36 percent, 3 percentage points shy of the San Diego region and second among the five 78 Corridor cities.

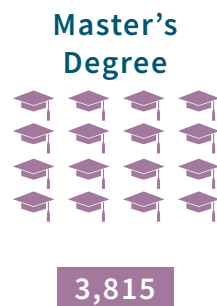
36%
BACHELOR'S DEGREE
OR HIGHER

9.6%
MASTER'S DEGREE
OR HIGHER

1.7%
DOCTORATE
OR HIGHER

DEGREE HOLDERS BY DEGREE TYPE SAN MARCOS RESIDENTS 25 YEARS+

22.5K
DEGREE
HOLDERS



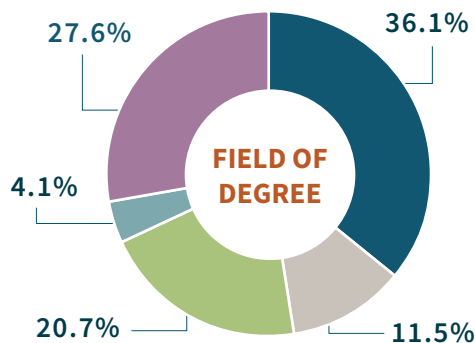
62.5K SAN MARCOS RESIDENTS ARE 25 OR OLDER

Source: ACS 1-Year Estimate, 2017

ZOOMING IN ON DEGREES

Nearly half — roughly 47 percent — of degree holders specialize in science, engineering or related fields. These fields are particularly popular in the 25 to 39 age group and are less common among older generations who favor business, education, arts and humanities fields of degree.

- Science & Engineering
- Science & Engineering Related Fields
- Business
- Education
- Arts, Humanities & Others

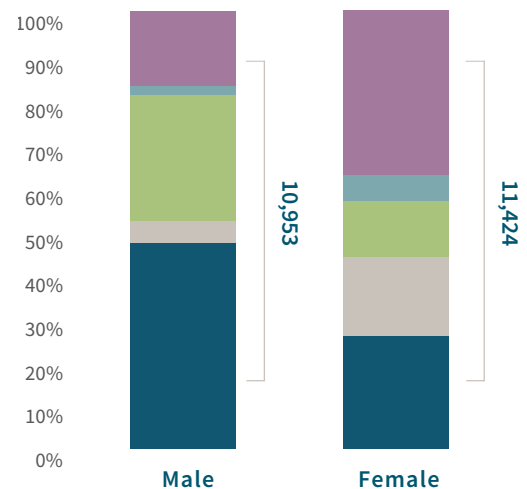


Source: ACS 1-Year Estimate, 2017

FIELD OF DEGREE BY AGE

	25-39 years	40-64 years	65+ years	Total
Science & Engineering	3,100	3,400	1,620	8,120
Science & Engineering Related Fields	1,170	1,090	330	2,590
Business	1,780	2,210	670	4,660
Education	170	130	630	930
Arts, Humanities & Other	2,720	2,180	1,300	6,200
Total	8,940	9,010	4,550	22,500

FIELD OF DEGREE BY GENDER



EDUCATIONAL PIPELINE

Home to 8 academic institutions, San Marcos is responsible for more than **12 percent** of the San Diego region's total academic program completions.

In 2018, local institutions conferred more than 9,500 degrees and certificates. Collectively responsible for 86 percent of local completions, California State University San Marcos and Palomar College are the major talent-producing institutions in the city.



Institution	Certificates	Degrees	Total Completions
California State University-San Marcos	154	3,646	3,800
Palomar College	2,335	2,053	4,388
University of St Augustine for Health Sciences	0	831	831
United Education Institute College San Marcos	196	0	196
Palomar Institute of Cosmetology	117	0	117
California College San Diego	0	153	153
Pima Medical Institute San Marcos	31	0	31
University of St Katherine	0	11	11

Source: EMSI, 2018

IN-DEMAND ACADEMIC FIELDS

The top five degree fields account for nearly **67 percent** of all local program completions. Leading the way are health professions such as nursing, accounting for more than 2,500 degrees. The following programs prepare graduates for a wide array of occupations ranging from postsecondary teachers, social science researchers, managers and chief executives, physical therapists and life scientists.

PROGRAM COMPLETIONS ACROSS TOP 5 DEGREE FIELDS, 2015

HEALTH PROFESSIONS

2,516

LIBERAL ARTS & SCIENCES

1,422

SOCIAL SCIENCES

1,120

BUSINESS MRKT & MGT

934

PSYCHOLOGY

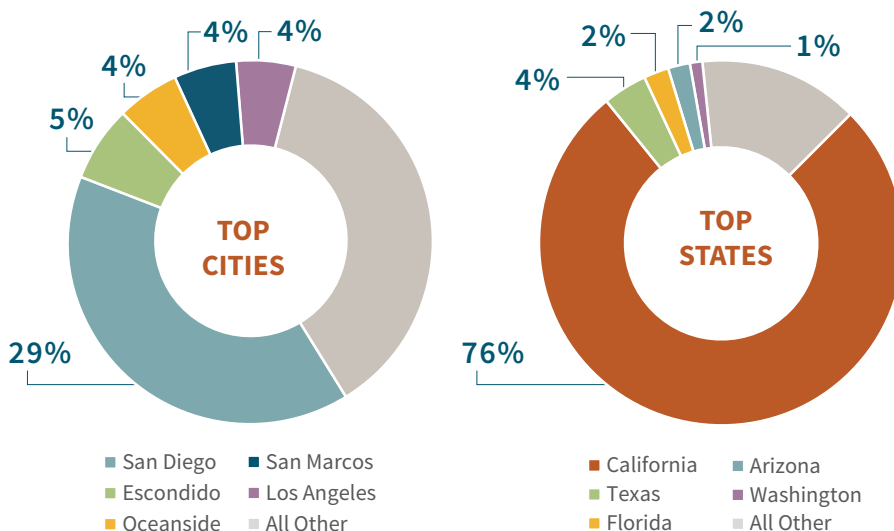
390

Source: EMSI, 2018

WHERE THE TALENT GOES

As of 2018, there are 75,000+ professional profiles across the U.S. of people who identify as alumni of any of the city's academic institutions. Although the vast majority — **76 percent** — of these alumni chose to remain in the state, San Marcos' graduates are employed across the nation and in a wide array of occupations.

Top occupations held by San Marcos alumni include customer service representatives, chief executives, secretaries/administrative assistants, managers and retail salespersons.



Source: EMSI, 2018 & 2019
Note: Data excludes United Education Institute College San Marcos alumni profiles.

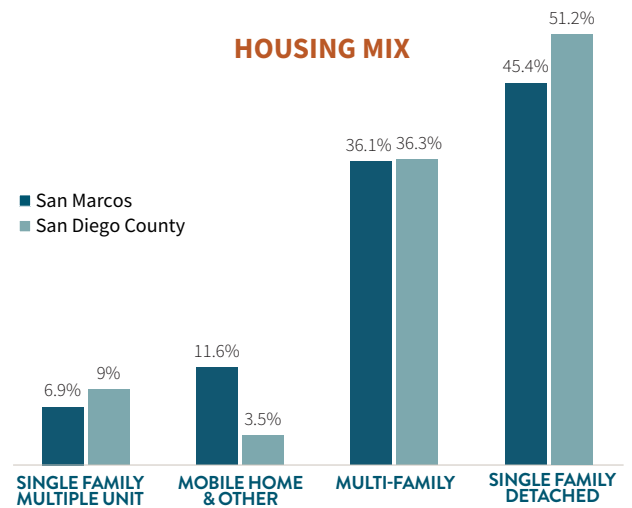
PART 3: HOUSING MARKET MIX & PRICES

HOUSING STOCK

In 2018, there were **31,304** housing units in San Marcos, nearly half of which were single family detached homes. The housing stock mix is slightly more skewed toward single family detached homes than the county overall. However, the proportion of single family multi-unit housing is less than half of that of the region, whereas mobile homes are more than three times as concentrated.

Growth in housing stock generally correlates with increases in job creation and population. With more opportunities for new development as compared to other cities throughout the region, San Marcos has seen both its population and housing stock increase at a faster rate than the region as a whole. Between 2010 and 2025, housing stock grew by **26.5 percent** compared to the regional rate of 12.7 percent.

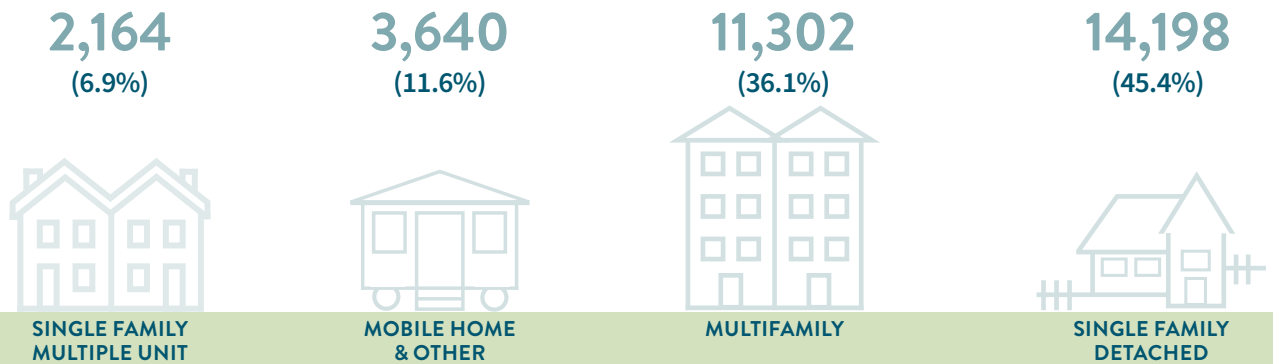
HOUSING MIX



Source: SANDAG Estimate, 2018

HOUSEHOLDS BY HOUSING TYPE

of Households (Vacancy Rate)



Single family housing units which share at least one wall with a neighboring unit.

Mobile homes or trailers to which no permanent rooms have been added.

Units in structures with two or more housing units.

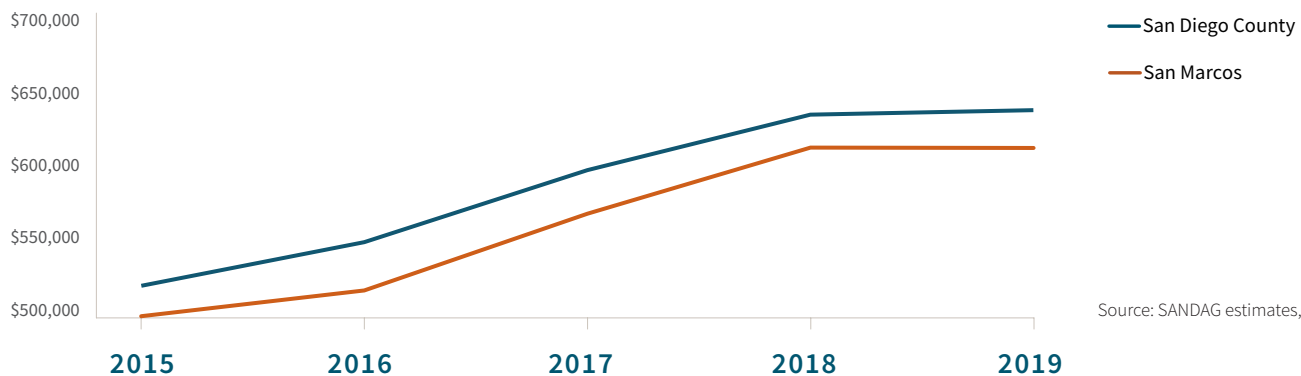
Single housing unit with detached structure — open space on all sides.

Source: SANDAG Estimate, 2018

HOME PRICES

Home price growth has moderated over the past year, after a strong recovery following the economic downturn. San Marcos' housing market saw stronger price appreciation than the region in 2018. At the end of 2019, the median home price stood at **\$612,250** — just below the county median of \$637,000. Home prices in San Marcos are the second highest among the 78 Corridor's five cities.

SAN MARCOS MEDIAN HOME PRICES



Source: SANDAG estimates, 2015-2019

ECONOMY AT A GLANCE

San Marcos boasts a robust and diverse economic base. With 45,000+ jobs, more than 4,300 businesses, and annual GDP totaling \$7.9 billion, San Marcos is an economic powerhouse and major player in North County's economic landscape.

JOBS
46,259
2018

UNEMPLOYMENT RATE
2.8%
2019

GROSS REGIONAL PRODUCT
\$7.9B
2015

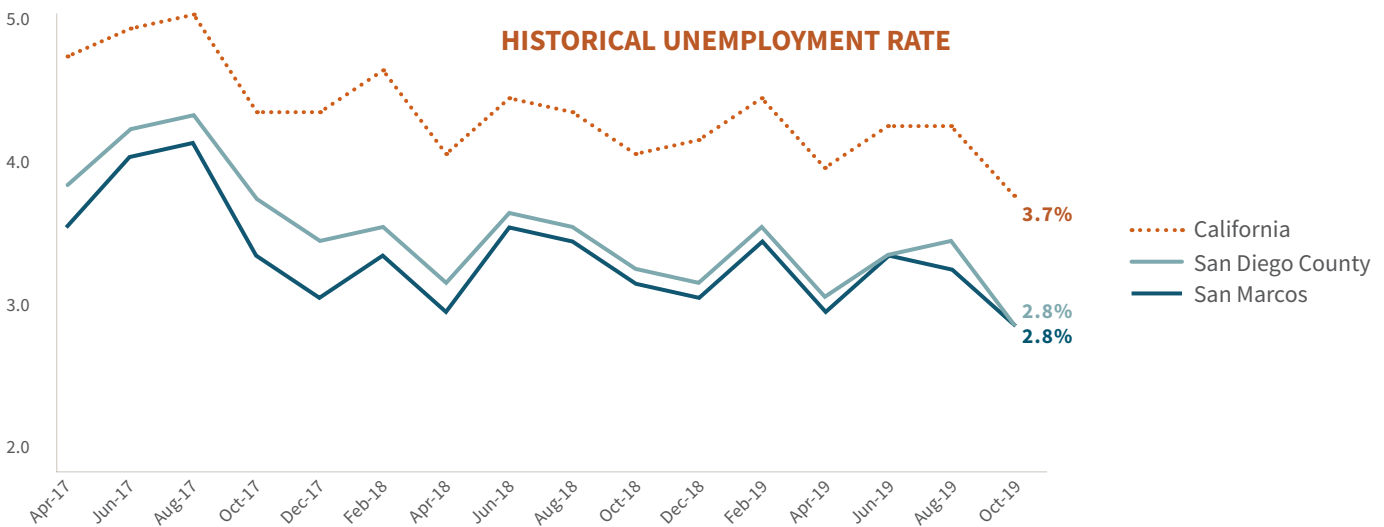
BUSINESSES
4,331
2019

MEDIAN INCOME
\$76,272
2017

Source: EDD, 2018. EMSI, 2018. ACS 1-year estimates, 2017. City of San Marcos, 2019.

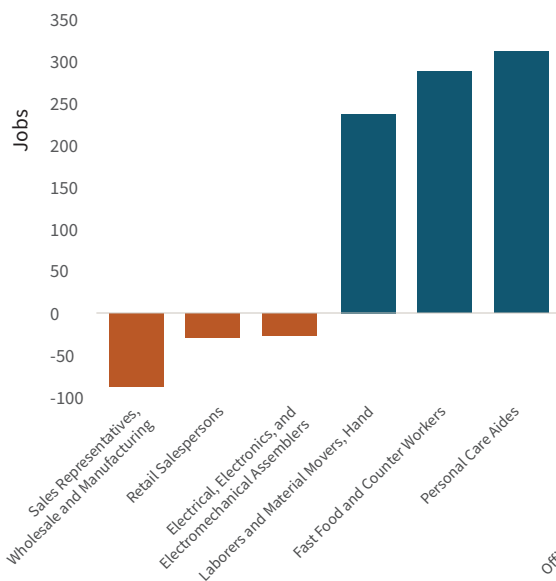
UNEMPLOYMENT

Claiming an impressive average unemployment rate of 2.8 percent in October 2019, San Marcos is a stabilizing presence in North County. The city weathered the Great Recession better than the region, state and nation. Even during the depths of the recession, San Marcos' unemployment rate never exceeded ten percent — a remarkable claim for any California locality.



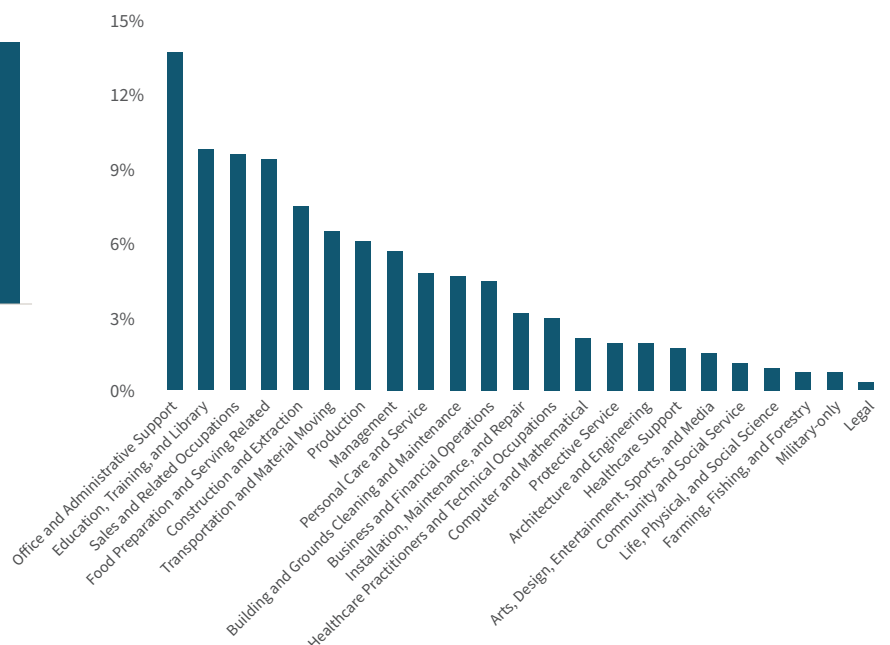
Source: EDD, 2017-2019

GROWING & DECLINING OCCUPATIONS, 2011-2016



Source: EMSI, 2019

EMPLOYED RESIDENTS BY OCCUPATION

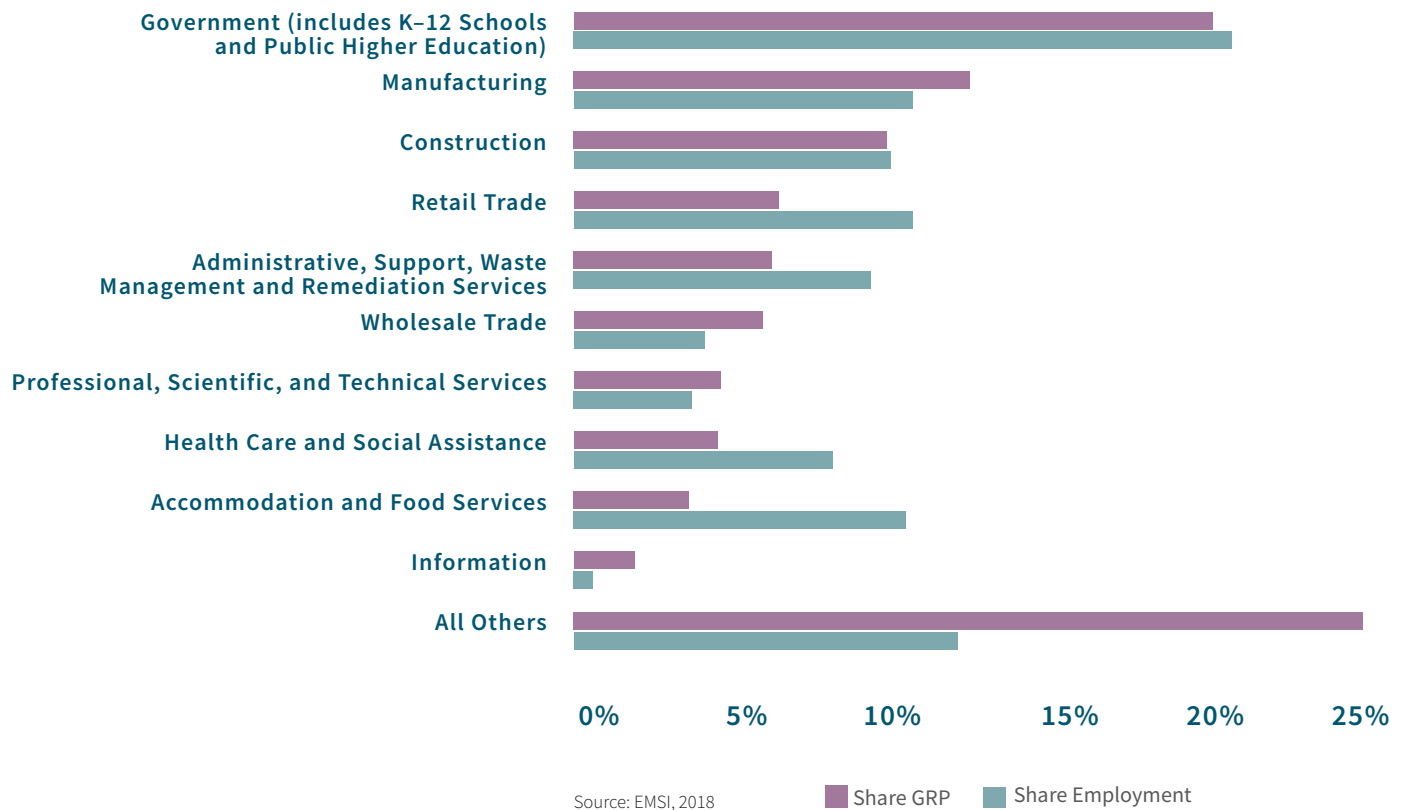


PART 4: THE ECONOMY ECONOMIC BASE

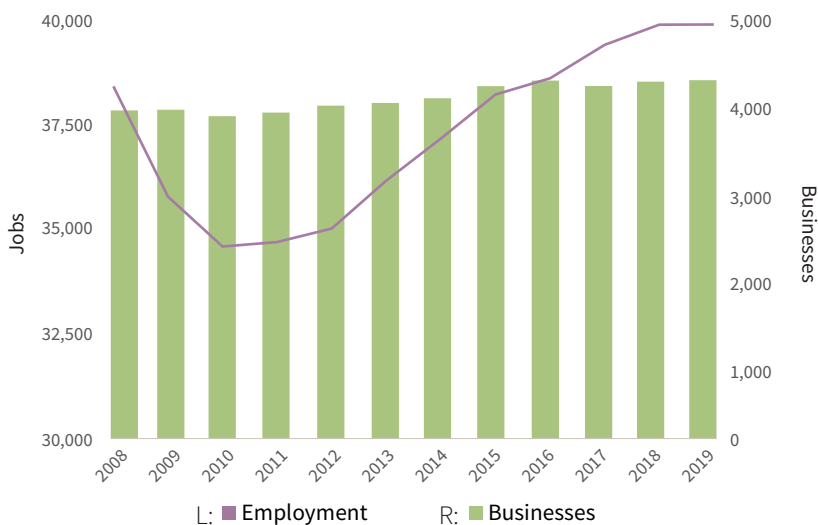
ECONOMIC PLAYERS

The city's economy totaled **\$7.9 billion** in 2015. Employment has returned to pre-recession levels and today, government is the largest sector of the city's economy, accounting for roughly twenty percent of both employment and GRP.

EMPLOYMENT & GRP CONTRIBUTION BY SECTOR



BUSINESSES & EMPLOYMENT TRENDS



STRONG BUSINESS PRESENCE

Today the city is home to more than **4,300** business establishments. While employment declined sharply during the Great Recession, the overall business count in San Marcos remained relatively stable. Local firms' resiliency has been a key to San Marcos' growth and continued economic dominance.

Source: EMSI, 2019. City of San Marcos, 2019.

COMMUTE PATTERNS

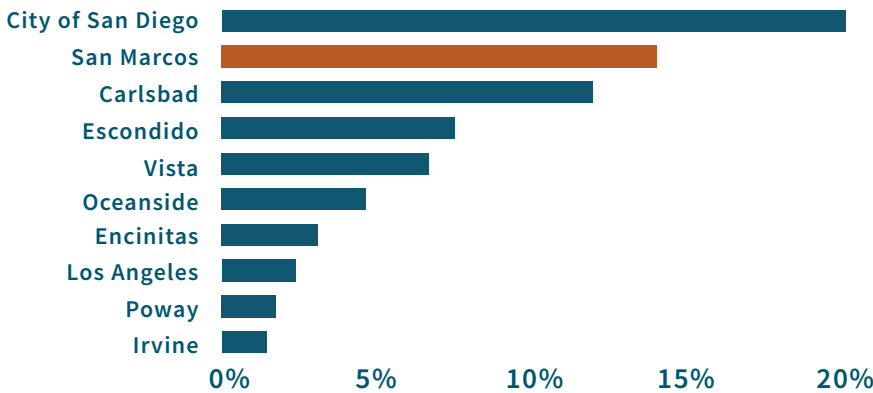
Roughly **14 percent** of San Marcos' residents live and work within the city. **44 percent** work on the 78 Corridor. The overwhelming majority — 86 percent — are employed primarily in other areas of the region. A small minority commute beyond county boundaries for work.

Nearly one-quarter of San Marcos residents commute to major regional employment centers within the City of San Diego, including Downtown and the Golden Triangle Area, the area bounded by interstates 5 and 805 and route 52. The other four cities along the 78 corridor capture nearly 30 percent of San Marcos residents commuting outside of the city for work.

OF EMPLOYED RESIDENTS COMMUTE LESS THAN 10 MILES FOR WORK.

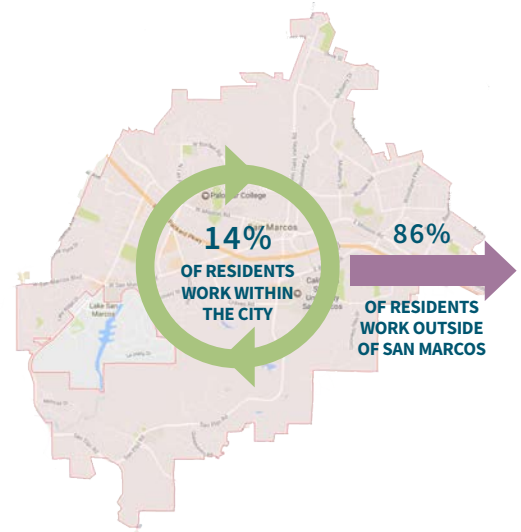
47%

TOP 10 EMPLOYMENT DESTINATIONS FOR SAN MARCOS RESIDENTS



Source: LEHD On the Map, 2017

INFLOW & OUTFLOW OF WORKERS



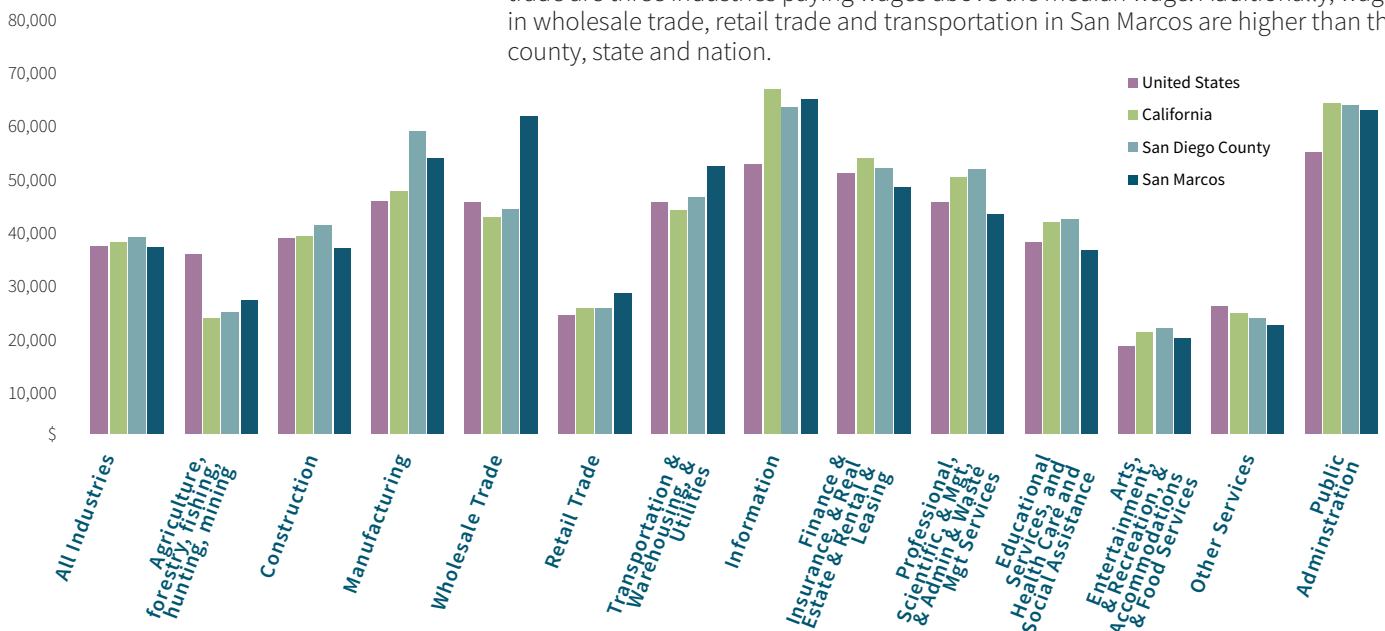
Source: LEHD On the Map, 2017

46%

OF WORKERS AT SAN MARCOS BUSINESSES LIVE ALONG THE 78 CORRIDOR

MEDIAN INCOME BY INDUSTRY

Median income by industry varies significantly; industries with high value goods and services often pay above average wages. Information, transportation and wholesale trade are three industries paying wages above the median wage. Additionally, wages in wholesale trade, retail trade and transportation in San Marcos are higher than the county, state and nation.



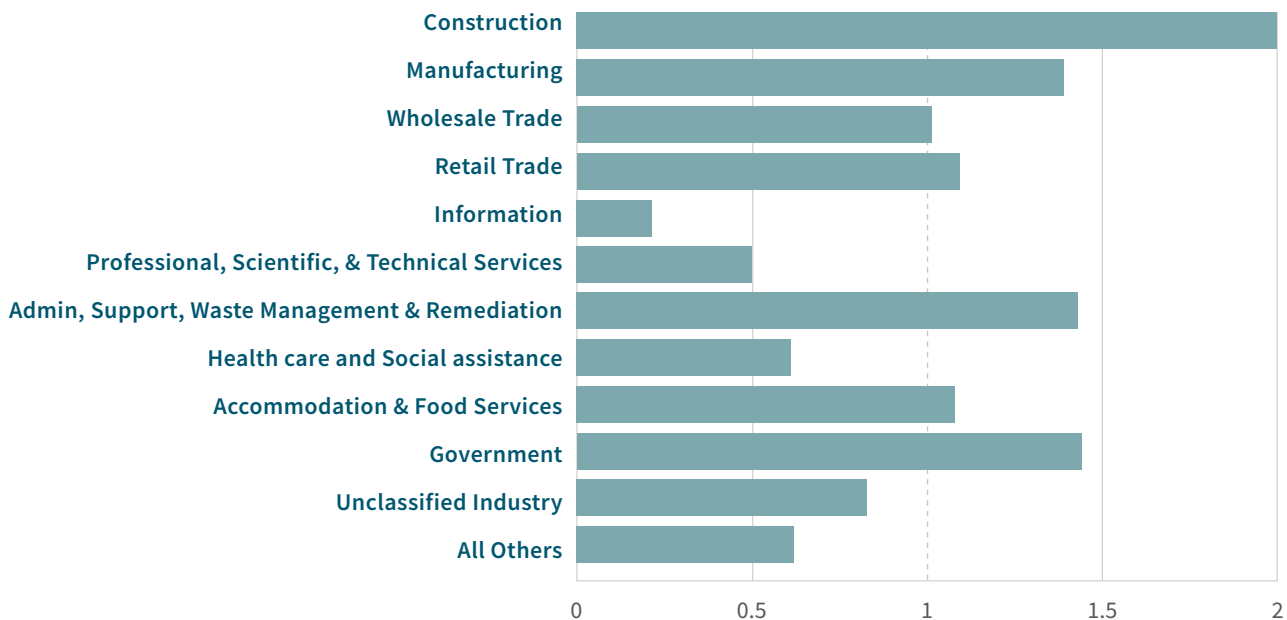
Source: American Community Survey 5-Year Estimates, 2013-2017

PART 4: INDUSTRY & PUBLIC SAFETY

LOCATION QUOTIENT

Location quotient (LQ) is a measure of the relative concentration of an industry against a baseline (in this case the state of California). An LQ of 1.0 indicates an industry has the same relative concentration. An LQ of 2.0 indicates that there are twice as many jobs in a particular industry as are found in the baseline comparison. Thus, in the case of San Marcos, there are twice as many construction jobs and 39 percent more manufacturing jobs in the city than would be found if the city was just the same as the State of California.

SAN MARCOS INDUSTRY CONCENTRATION AGAINST CALIFORNIA



Source: EMSI, 2019

CRIME RATES

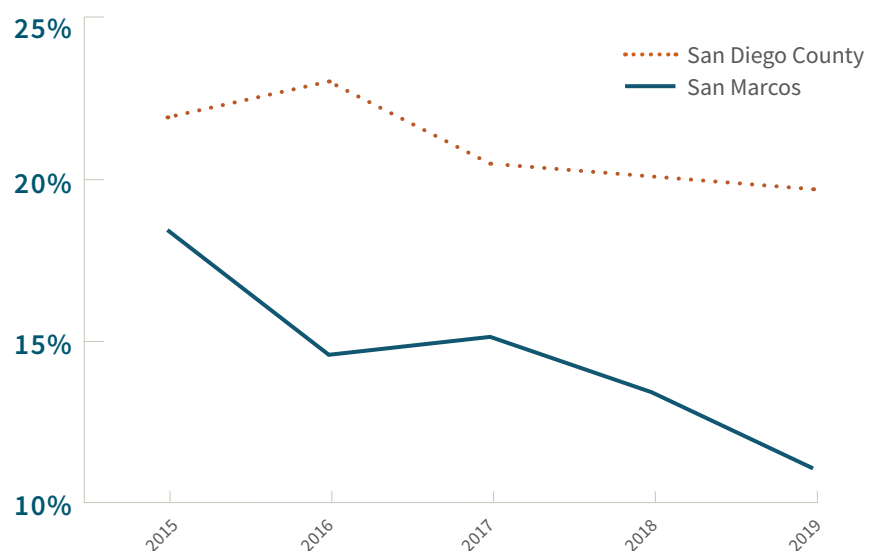
San Marcos has some of the lowest crime rates among the 18 incorporated cities in San Diego County, according to new data.

This underscores a recent downward trend in San Marcos crime. The City's property crime rate is **8.94 percent** — which is a **46 percent drop** since 2015. The City's overall crime rate is 11.03 percent — which is a 40 percent drop since 2015.

When compared to the county's incorporated cities, San Marcos has lowest overall property crime rate, which includes non-violent crimes such as burglaries, auto thefts and vandalism. San Marcos also has the second lowest overall crime rate, which includes all violent and nonviolent crimes.

Source: SANDAG, 2015-2019

FBI INDEX CRIME RATES PER 1,000 POPULATION



DISCOVER LIFE'S POSSIBILITIES

San Marcos is the birthplace of San Diego's most iconic craft beer company, Stone Brewing Co., as well as home to North County's only University, California State University San Marcos. There are many amenities that provide a high quality of life to residents. San Marcos Unified School District ranks highly within the county, across multiple categories, including number one in safety and number one in athletics. The city boasts ample public space, including 19 community parks and 18 mini parks. It also offers hundreds of dining options, like those found in North City, which features the 21,000-square-foot Urge Gastropub and bowling alley, as well as student housing and luxury apartments.



300+
ACRES
OF PARK SPACE
19 Community Parks
19 Mini Parks



Source: City of San Marcos, 2018



72
MILES OF
MULTI-USE TRAILS



Source: City of San Marcos, 2018



10
BREWERIES
600+
Beers on Tap



Source: Untappd, 2017



220
RESTAURANT
ESTABLISHMENTS



Source: County of San Diego, 2017



**SAN MARCOS UNIFIED
SCHOOL DISTRICT
RANKS
5th
IN THE COUNTY**



Source: Niche K-12 rankings, 2017

SAN MARCOS

DISCOVER LIFE'S POSSIBILITIES