

# **Carlsbad, California**

## *Indicators Report*

by  
The National Economic Education Delegation (NEED)

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Exploring the economics, demographics, and well-being of Carlsbad and its residents through indicators.

This report was produced by the:

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# Executive Summary

## *Assessing the City with Indicators*

### **About this Report**

This report provides background or summary information for the city of Carlsbad (the City) in the form of indicators.

### **Using this Report**

Indicators are measures of various aspects of a regional economy. They help to provide an indication of the quality of life in a region and progress toward improving conditions in the local economy. This report focuses on indicators

for changing demographics, incomes, housing markets, commute patterns, and employment in Carlsbad. These indicators are compared to San Diego County (the County) as a whole, a broader region where one is well defined, California, and the United States.

This report is vital for understanding trends in the underlying economy. It does not provide forecasts, but Rob Eyler and Jon Haveman at Economic Forensics and Analytics are available to provide them if that is of interest.

### **Topics Covered:**

- **Demographics:** A detailed snapshot of Carlsbad demographics is presented. This provides evidence on the size, age and sex, income and poverty status, race and ethnicity, housing status, living arrangements, education, health, and transportation choices of the population. Beyond the current population level, data on trends in local population growth, in comparison with other broader regions is presented, in both tabular and graphical form.
- **Employment Report:** Here, we provide a brief snapshot of employment and unemployment in Carlsbad and how the City's experience differs from broader regions.
- **Income and Earnings:** Vital to understanding the prosperity of a city relative to its surrounding area is information on income and earnings. We provide a ranking of the City's income relative to all cities in California as well as growth relative to local regions. Inequality and poverty status are also important indicators for the level of equity in the community. We provide evidence of trends in both, not only for all residents, but also for children separately.
- **Housing:** This section provides evidence on the cost and availability of housing. Both median home values and rental costs are included, along with detailed information on home ownership, by age and income, in particular. Further, evidence is provided on the housing burden in the City, again, in comparison with other broader regions. We also provide evidence on the rate at which new buildings and units are permitted along with a broader housing picture. Finally, we provide evidence on the age of the housing stock in Carlsbad, along with information on how long the City's residents have been in place.
- **Transportation:** Increasingly important, in the wake of the pandemic, is an understanding of the transportation patterns and choices of local residents. We provide detailed evidence on the proportion of residents who work from home and on the various transportation choices of those who head to the office. This information is also provided for those who work in Carlsbad, but do not necessarily live in Carlsbad.
- **Migration:** Population changes comes primarily through organic causes: births and deaths. Migration between regions also plays a significant role in population growth. A final section of the report provides evidence on migration into and out of the City.

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# Demographics

**Definition:**

Data on the demographics of a city indicate the nature of the population, with a focus on age, gender, race and ethnicity, as well as household composition.

**Why is it important?**

The characteristics and growth of Carlsbad's population are fundamental indicators of the city's growth potential.

***A Demographic Snapshot***



Statistic	2022	2019
<b>POPULATION</b>		
Population Estimate (#, 5yr)	114,745.0	114,253.0
Veterans (#, 5yr)	6,481.0	6,274.0
Foreign born persons (% , 5yr)	15.5	14.4
Population age 25+ (#, 5yr)	81,198.0	80,508.0
<b>AGE AND SEX</b>		
Persons under 5 years (% , 5yr)	4.1	5.6
Persons under 18 years (% , 5yr)	22.8	23.1
Persons 65 years and over (% , 5yr)	17.8	17.3
Female persons (% , 5yr)	50.1	51.6
<b>INCOME AND POVERTY</b>		
Median household income (\$, 5yr)	134,139.0	110,478.0
Per capita income in past 12 months (\$, 5yr)	66,944.0	58,440.0
Persons in poverty (% , 5yr)	6.9	5.8
Children age less than 18 in poverty (#, 5yr)	1,681.0	1,727.0
Children age less than 18 in poverty (% , 5yr)	6.5	6.6
<b>RACE AND ETHNICITY</b>		
White alone (% , 5yr)	74.2	84.9
African American alone (% , 5yr)	1.2	0.9
American Indian or Alaska Native alone (% , 5yr)	0.5	0.2
Asian alone (% , 5yr)	9.7	8.0
Native Hawaiian and Other Pacific Islander alone (% , 5yr)	0.1	0.2
Two or More Races (% , 5yr)	11.0	4.3
Hispanic or Latino (% , 5yr)	16.6	13.9
White alone, not Hispanic or Latino (% , 5yr)	67.2	73.3
<b>HOUSING</b>		
Housing units (#, 5yr)	47,556.0	47,885.0
Owner-occupied housing units (% , 5yr)	62.2	64.7
Median value of owner-occupied housing units (\$, 5yr)	1,070,500.0	814,700.0
Median selected monthly owner costs-with a mortgage (\$, 5yr)	3,628.0	3,286.0
Median selected monthly owner costs-without a mortgage (\$, 5yr)	919.0	757.0
Median gross rent (\$, 5yr)	2,477.0	2,025.0
<b>FAMILIES AND LIVING ARRANGEMENTS</b>		
Households (#, 5yr)	43,912.0	43,531.0
Persons per household (#, 5yr)	2.6	2.6
Living in same house 1 year ago, % of persons age 1+ (5yr)	85.2	86.0
<b>EDUCATION</b>		
High school graduate or higher, % of persons age 25+ (5yr)	95.1	95.2
Bachelor's degree or higher, % of persons age 25+ (5yr)	59.5	59.5
<b>HEALTH</b>		
With a disability, under age 65 years (#, 5yr)	5,519.0	4,739.0
Persons without health insurance, under age 65 years (% , 5yr)	4.9	4.6
<b>LABOR FORCE</b>		
In civilian labor force, persons age 16+ (% , 5yr)	65.2	65.0
In civilian labor force, women age 16+ (% , 5yr)	57.9	57.3
Employed, persons age 16+ (% , 5yr)	58.2	59.2
Self employed (% , 5yr)	15.0	14.3
<b>TRANSPORTATION</b>		
Mean travel time to work, workers age 16+ (Mins., 5yr)	22.2	25.6
Drive alone in private vehicle (% , 5yr)	68.6	77.3
Using public transportation (% , 5yr)	1.6	2.3
Worked from home (% , 5yr)	25.7	14.3

Source: American Community Survey, Summary Files

Note: Data are from the 1-year files unless indicated by the notation 5yr.

## Current Population

The data in these two tables and the following two graphs are from the CA Department of Finance (DOF). The DOF produces population estimates for geographies around California twice a year: January and July. As estimates for cities are only available in January, these two tables are based on the January data. The remaining figures are from the American Community Survey (ACS), provided annually by the U.S. Bureau of the Census.

**Table 1. Population Change by Region**  
(Thousands, January to January)

Region	2023 Population	% Change		
		1 Year	3 Year	5 Year
<b>City</b>				
Carlsbad	114,549	-0.28	-0.10	-0.47
<b>County and Broader Regions</b>				
San Diego County	3,269,755	-0.17	-1.85	-1.90
Southern California	21,794,548	-0.41	-2.24	-2.84
California	38,940,231	-0.35	-1.79	-2.01

Source: CA DOF; Calculations by National Economic Education Delegation

**Table 2. County Population Change by City**  
(Thousands, January to January)

City	2022	2023	% Change		
			Local	Southern California	California
San Diego County	3,275.4	3,269.8	-0.17	-0.41	-0.35
San Diego	1,372.8	1,368.4	-0.32		
Chula Vista	274.1	274.8	0.26		
Oceanside	171.8	171.1	-0.41		
Escondido	150.1	149.8	-0.17		
Carlsbad	114.9	114.5	-0.28		
El Cajon	105.3	104.6	-0.61		
Vista	100.0	99.8	-0.14		
San Marcos	93.8	94.5	0.75		
Encinitas	61.3	61.1	-0.32		
National City	61.3	61.0	-0.54		
La Mesa	60.2	60.4	0.30		
Santee	58.7	59.2	0.88		
Poway	48.5	48.5	-0.04		
Lemon Grove	27.1	27.4	1.22		
Imperial Beach	26.0	25.9	-0.43		
Coronado	22.0	22.1	0.65		
Solana Beach	12.8	12.8	0.05		
Del Mar	3.9	3.9	0.00		

Source: CA DOF; Calculations by National Economic Education Delegation

Figure 1: Population Growth (1)

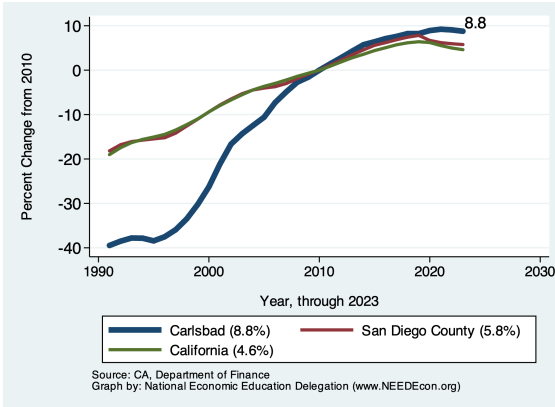


Figure 2: Population Growth (2)

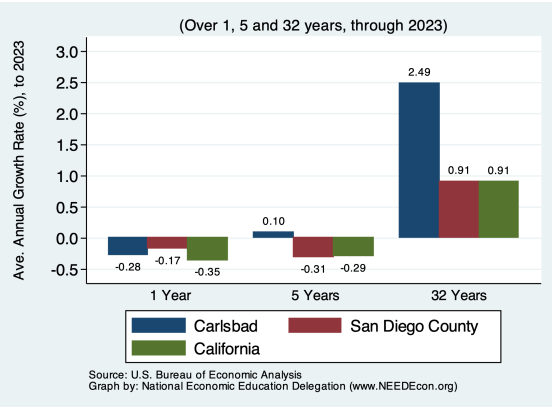


Figure 3: Population by Age - Detailed Age Categories

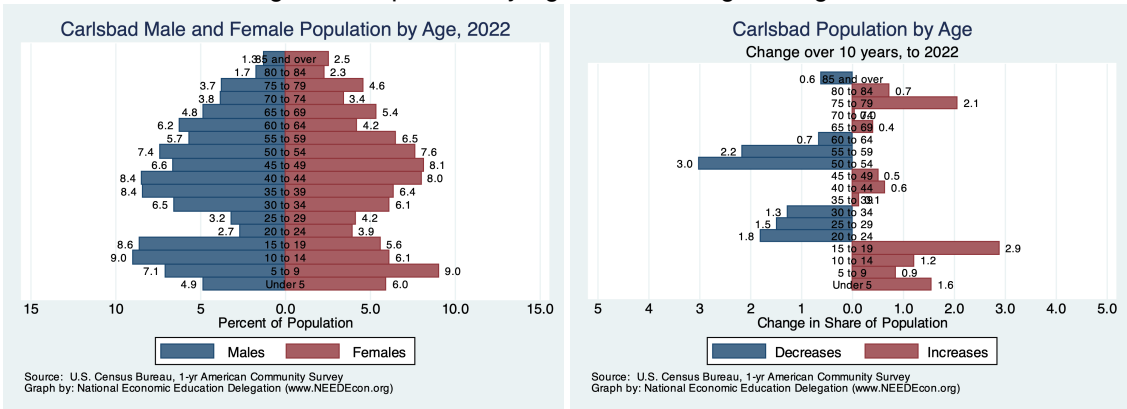


Figure 4: Population by Age - Broad Age Categories

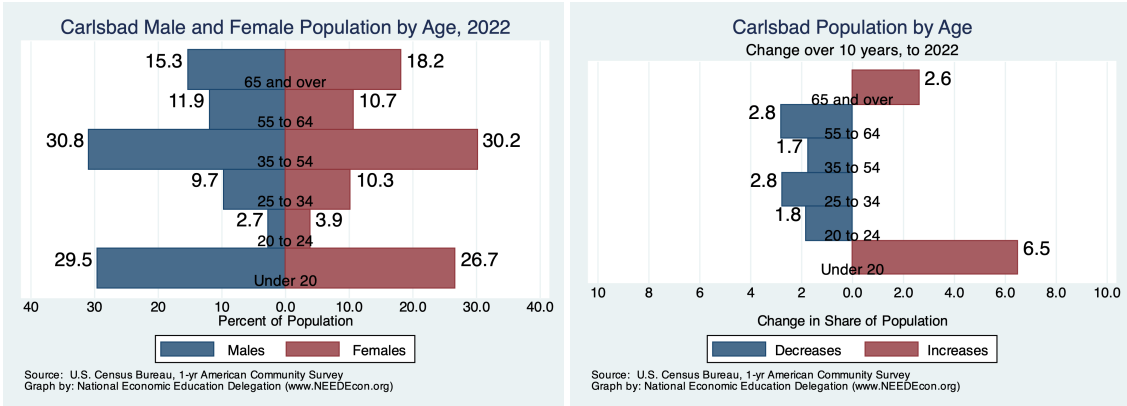


Figure 5: Population by Educational Attainment

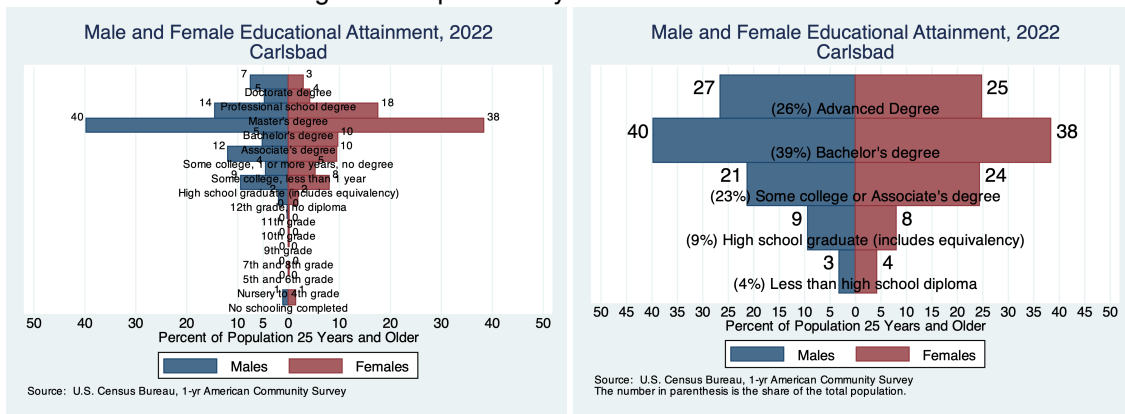


Figure 6: Population by Race/Ethnicity

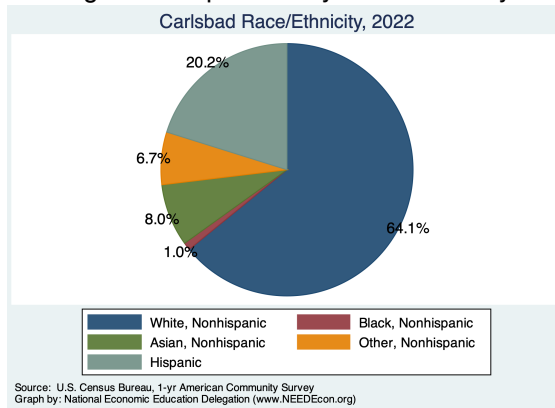
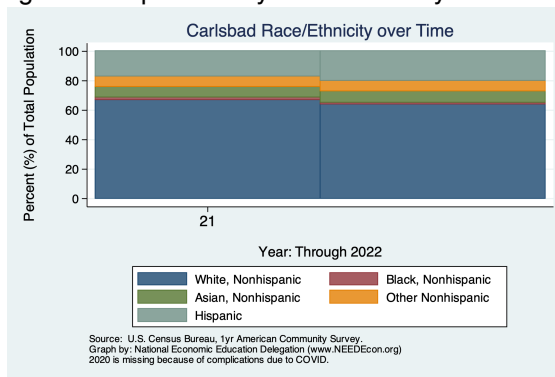


Figure 7: Population by Race/Ethnicity Over Time



# Employment Report

## Citywide Employment and Unemployment

### Definition:

Each month, California's Employment Development Division (EDD) publishes an update on employment in California and in MSAs, counties, and cities all across the state. The report focuses primarily on non-farm employment, providing estimates of changes in em-

ployment by industry as well as unemployment in each region. Data for cities is limited to aggregate employment, labor force, and unemployment data. Those are reported below.

### Why is it important?

Employment growth is a fundamental indicator of the health of an economy.

Table 3. Carlsbad Summary for March, 2024

Category	Current Value	Change From:		
		Last Month	2 Months Ago	Last Year
Employment	8,924	-30	-53	-103
Labor Force	9,644	9	15	96
Number Unemployed	678	-4	21	97
Unemployment Rate	7.0	-0.0	0.2	0.9

Source: EDD, National Economic Education Delegation

Figure 8: Historical Employment and Unemployment - Last 12 Months



Figure 9: Employment and Unemployment - Last 12 Months

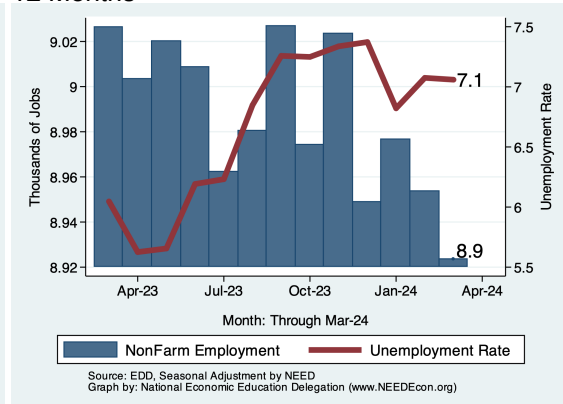


Figure 10: Relative Employment Growth Across Regions - since 2010

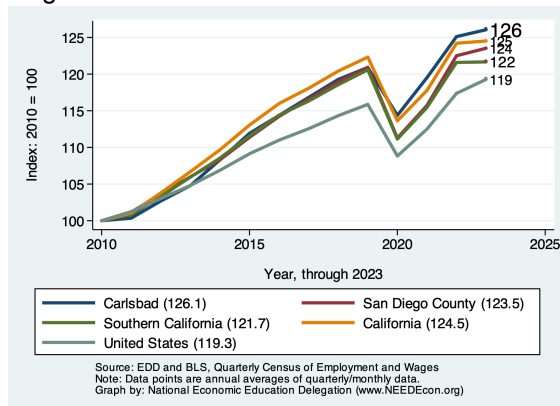
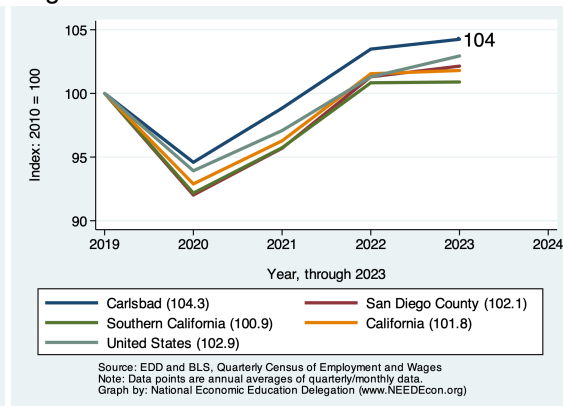


Figure 11: Relative Employment Growth Across Regions - since 2019



## County Employment by Industry

California's Employment Development Division (EDD) does not regularly produce data on employment by industry for cities. However, we are able to report industry-level employment data for San Diego County. The following table provides the latest data for the County.

Table 4. Employment Growth by Industry in San Diego County for March, 2024

Industry	Employment	Share	Empl Growth	% Growth - Annualized Rate					
				Month	Qtr	6mo	1yr	3yr	5yr
<b>Total Nonfarm</b>	1,562,672	100.0	1,044.9	0.8	0.9	1.2	0.9	3.8	0.9
<b>Total Private</b>	1,307,241	83.7	578.9	0.5	0.5	1.1	0.6	3.9	1.0
<b>Goods Producing</b>	204,267	13.1	1,175.9	7.2	-2.9	-1.1	-0.1	1.3	0.7
Mining, Logging and Construction	91,648	5.9	1,376.4	19.9	0.5	1.4	3.2	3.5	1.9
Mining and Logging	400	0.0	0.0	0.0	0.0	0.0	33.3	11.1	6.7
Construction	91,237	5.8	1,280.2	18.5	0.4	1.5	3.0	3.5	1.8
Manufacturing	112,600	7.2	-248.4	-2.6	-5.1	-3.3	-2.7	-0.4	-0.3
Durable Goods	82,107	5.3	-140.2	-2.0	-5.7	-3.7	-2.6	-0.9	-0.7
Non-Durable Goods	30,572	2.0	-20.8	-0.8	-3.1	-1.5	-2.9	1.1	1.1
<b>Service Providing</b>	1,358,608	86.9	598.0	0.5	1.7	1.5	1.1	4.2	0.9
Trade, Trans & Utilities	222,862	14.3	734.9	4.0	-0.3	-0.1	-0.1	1.1	-0.1
Wholesale Trade	42,238	2.7	45.1	1.3	-4.8	-3.8	-3.1	0.7	-0.9
Retail Trade	139,705	8.9	392.1	3.4	0.8	0.9	0.6	0.4	-0.9
Trans & Warehousing	34,755	2.2	140.0	5.0	-0.2	-1.6	0.1	3.6	3.9
Utilities	6,113	0.4	26.9	5.4	0.7	3.3	5.2	8.2	6.6
Information	21,190	1.4	186.3	11.2	-1.9	-4.6	-4.5	-0.6	-2.0
Financial Activities	71,664	4.6	-13.6	-0.2	-1.4	-0.7	-2.6	-1.7	-1.1
Finance & Insurance	41,316	2.6	8.0	0.2	-2.8	-2.4	-4.4	-3.9	-2.0
Real Estate & Rental & Leasing	30,356	1.9	47.6	1.9	2.1	1.9	-0.1	2.2	0.4
Professional & Business Svcs	269,563	17.3	-1,232.7	-5.3	-2.3	-1.9	-3.8	1.3	1.3
Prof, Sci, & Tech	153,258	9.8	-819.0	-6.2	-3.9	-2.7	-4.2	1.3	1.3
Admin & Support Svcs	90,260	5.8	-413.4	-5.3	0.3	0.7	-3.4	2.7	2.4
Employment Svcs	35,707	2.3	44.4	1.5	1.7	-2.6	-8.4	1.8	4.9
Educational & Health Svcs	253,835	16.2	1,047.7	5.1	7.1	6.0	6.5	6.1	3.6
Education Svcs	30,035	1.9	69.4	2.8	1.5	5.1	5.2	6.5	0.2
Health Care & Social Assistance	223,627	14.3	936.5	5.2	8.0	5.9	6.7	6.1	4.2
Leisure & Hospitality	205,387	13.1	-186.7	-1.1	0.3	2.6	2.8	14.9	0.4
Arts, Entertainment & Recreation	32,811	2.1	8.9	0.3	5.7	13.0	9.4	26.7	1.4
Accommodation & Food Svcs	173,029	11.1	-278.3	-1.9	0.1	1.5	1.5	13.2	0.2
Other Svcs	58,049	3.7	19.8	0.4	2.2	0.4	2.5	10.2	0.7
<b>Government</b>	255,691	16.4	522.3	2.5	3.6	2.8	2.5	3.2	0.4
Federal	47,317	3.0	136.1	3.5	2.2	2.4	-0.0	-0.4	-0.1
State	59,492	3.8	116.8	2.4	2.8	2.3	4.3	7.3	3.0
Local	149,100	9.5	276.0	2.2	5.6	3.3	2.6	3.0	-0.2
County	21,763	1.4	154.6	8.9	12.9	7.4	6.8	1.3	1.7
City	19,757	1.3	75.0	4.7	0.2	2.3	1.6	1.6	0.6
Local Government Education	79,213	5.1	144.5	2.2	2.1	0.9	1.8	4.6	-0.4

Source: EDD, National Economic Education Delegation (NEED)

## Some Employee Detail

### Employed in Carlsbad

Figure 12: Employment by Occupation

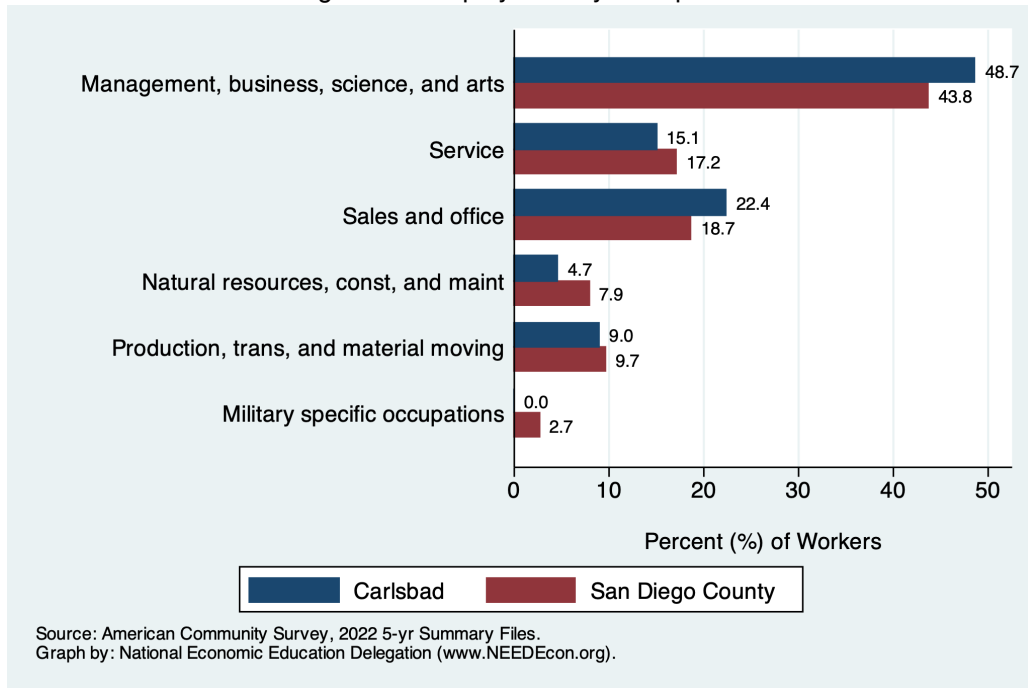


Figure 13: Employment by Industry

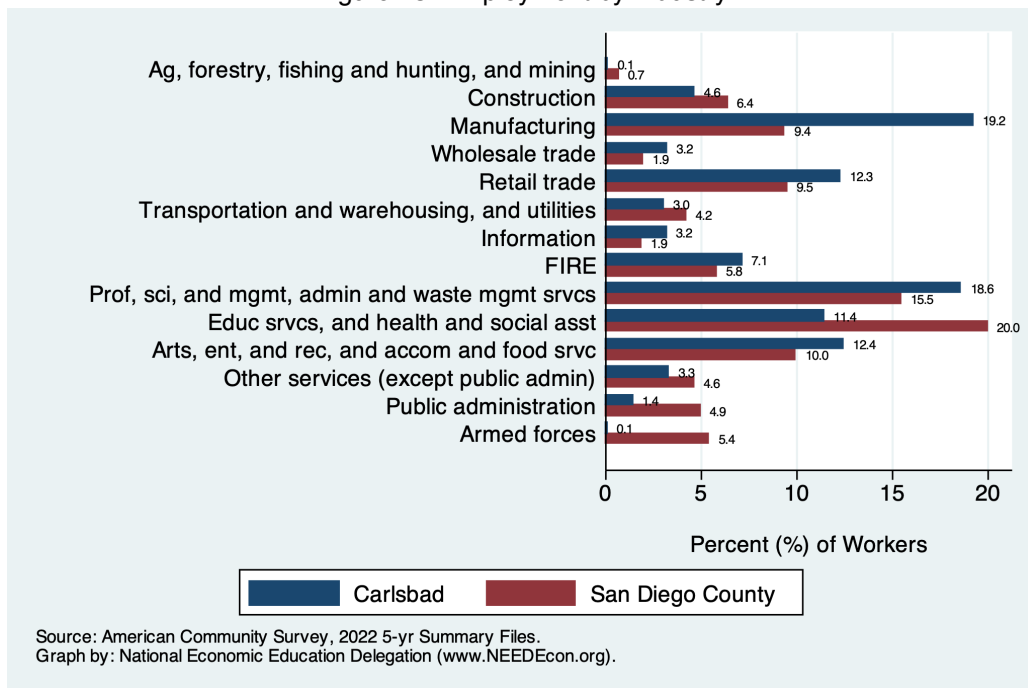
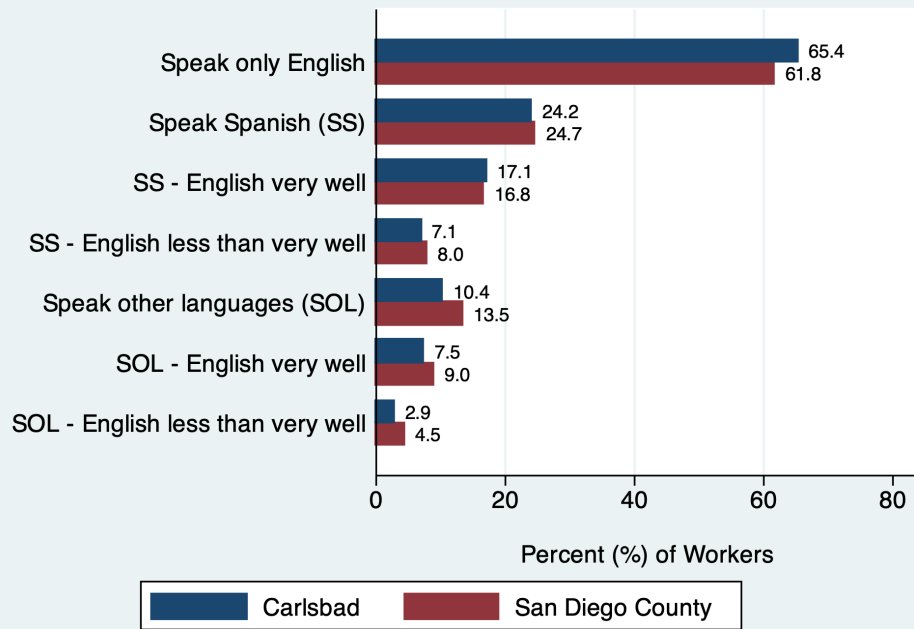
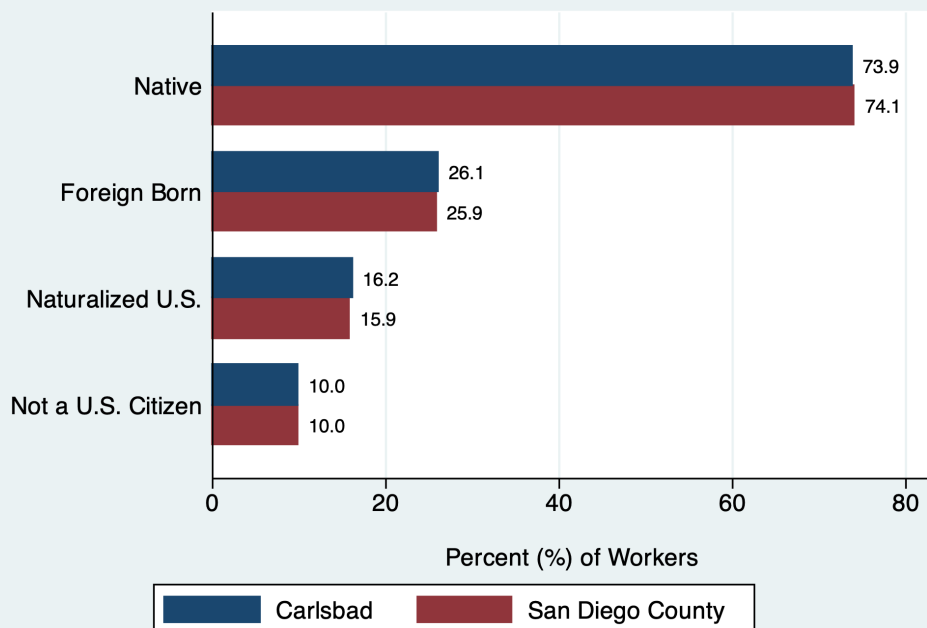


Figure 14: Language Spoken at Home



Source: American Community Survey, 2022 1-yr Summary Files.  
 Graph by: National Economic Education Delegation ([www.NEEDecon.org](http://www.NEEDecon.org)).

Figure 15: Citizenship



Source: American Community Survey, 2022 1-yr Summary Files.  
 Graph by: National Economic Education Delegation ([www.NEEDecon.org](http://www.NEEDecon.org)).



## Employed Residents of Carlsbad

Figure 16: Employment by Occupation

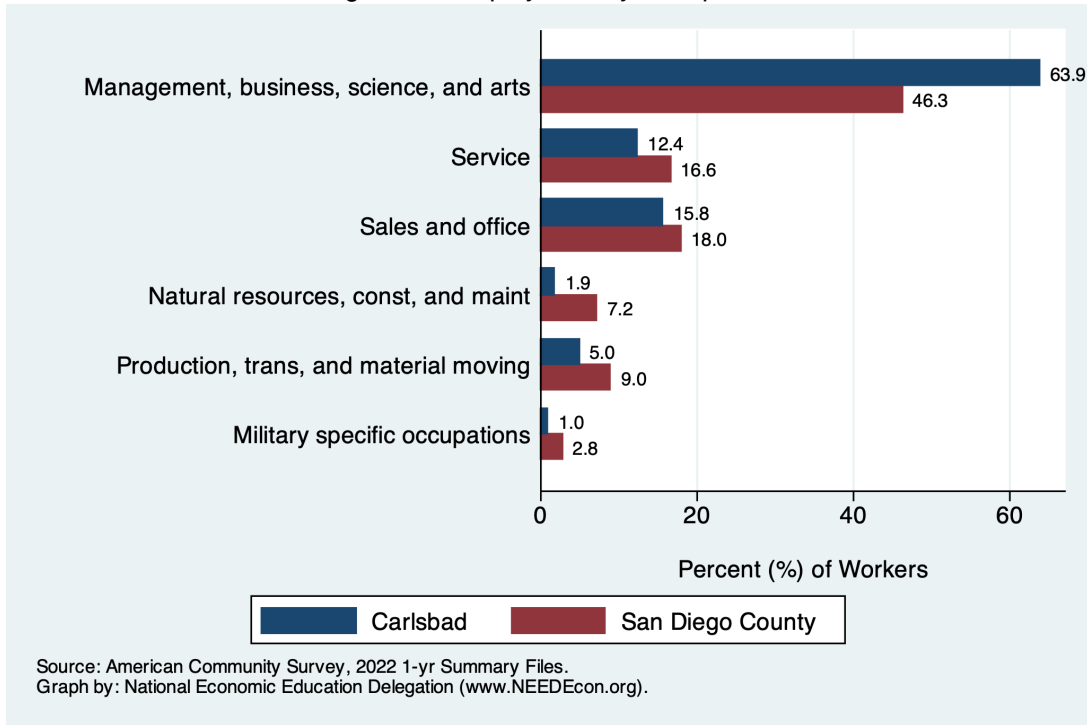


Figure 17: Employment by Industry

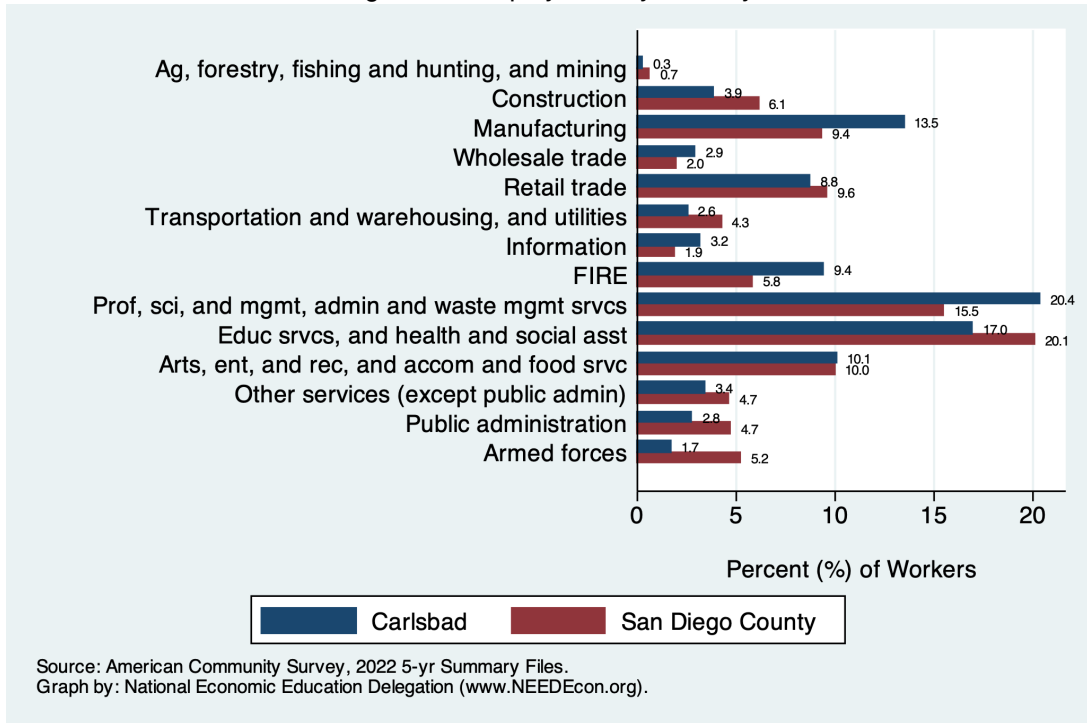


Figure 18: Language Spoken at Home

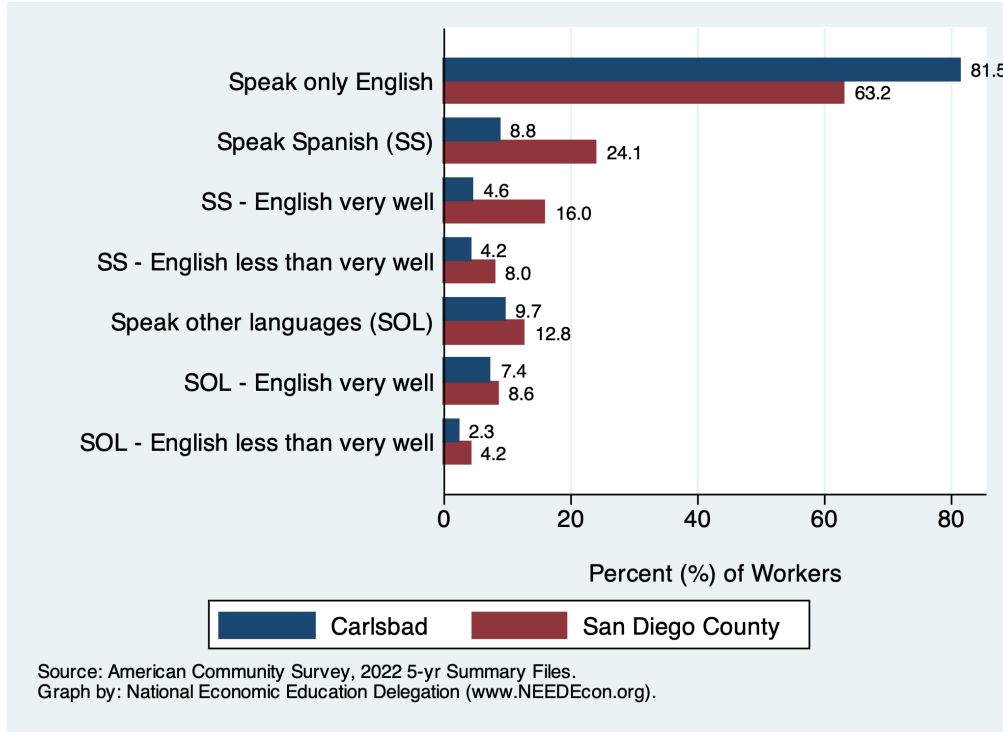
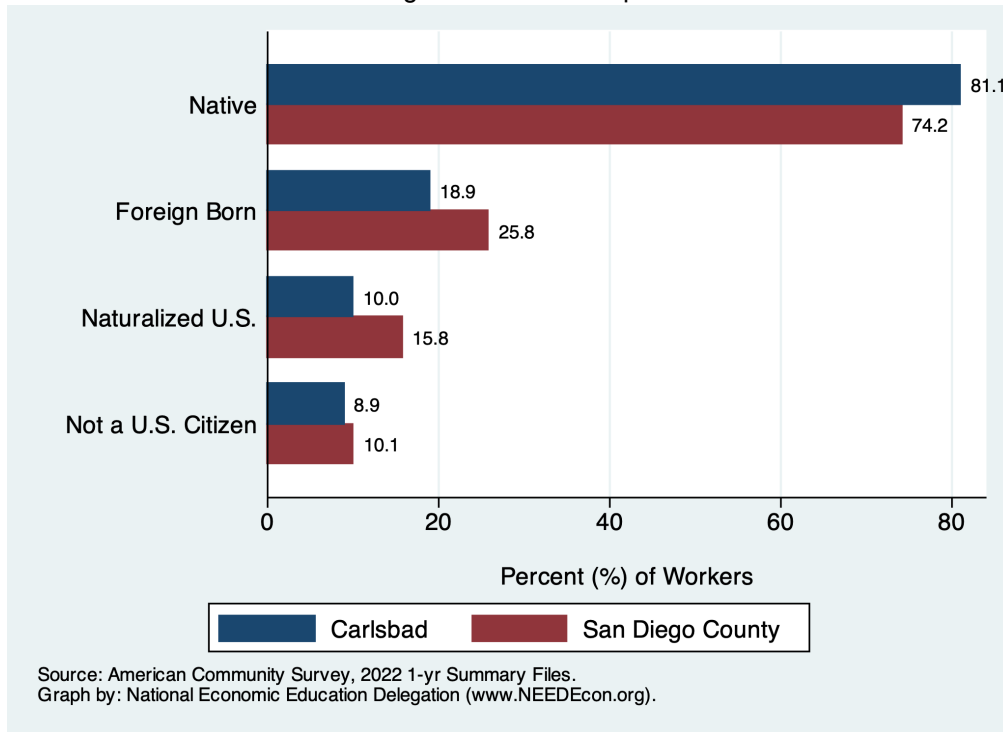


Figure 19: Citizenship



## Employed Residents vs Workers in Carlsbad

Figure 20: Employment by Occupation

N/A

Figure 21: Employment by Industry

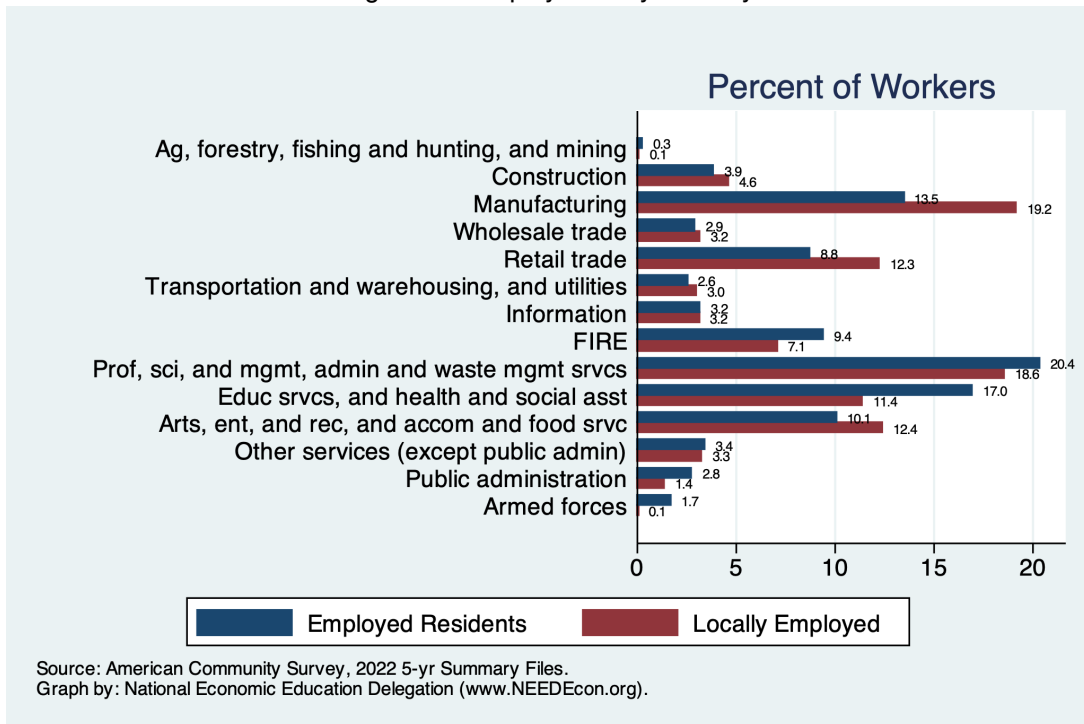


Figure 22: Language Spoken at Home

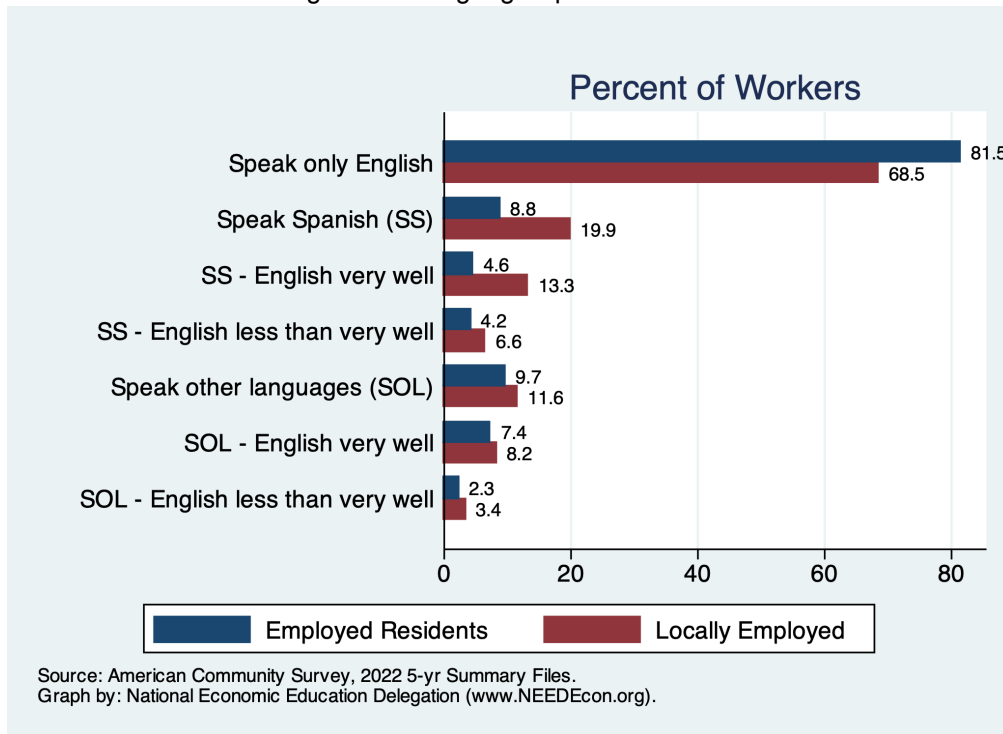
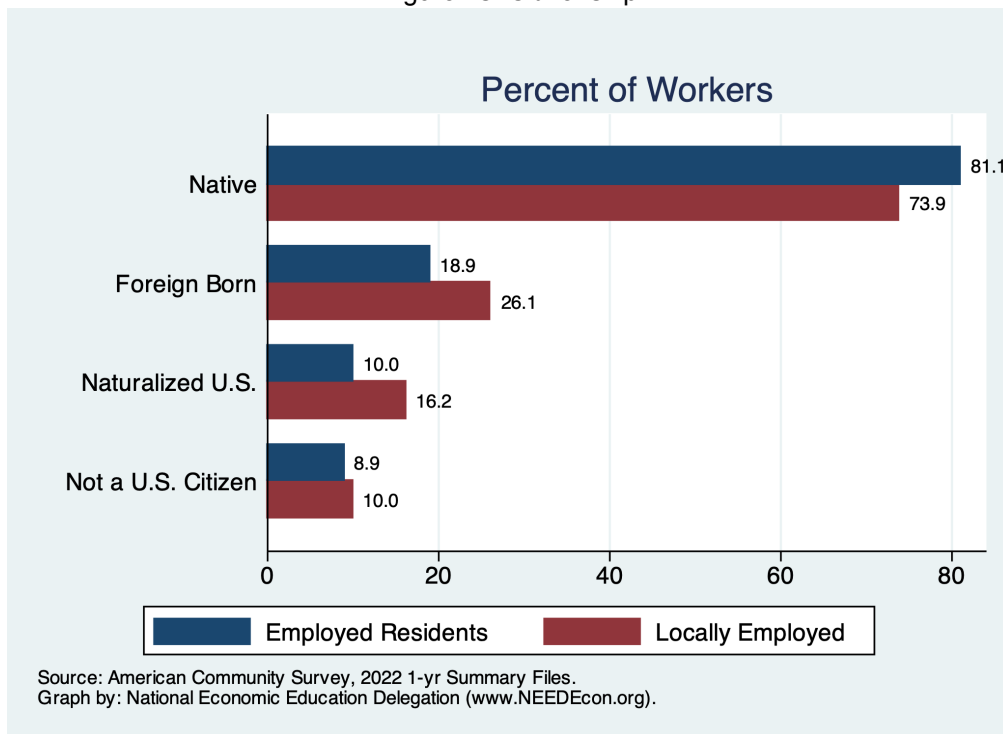


Figure 23: Citizenship



# Income and Earnings

## Per Capita Income Growth

### Definition:

Per capita income is the average income per person in Carlsbad. Personal income is the income received by, or on behalf of, all persons from all sources: from participation as laborers in production, from owning a home or unincorporated business, from the ownership of financial assets, and from government and business

in the form of transfer receipts. Noncash government benefits are not included.

### Why is it important?

Income is the money that is available to persons for consumption expenditures, taxes, interest payments, transfer payments to governments and the rest of the world, or for saving. As such, it is an important indicator of economic well-being in a community.

Figure 24: Real Per Capita Income Ranking Among California Cities

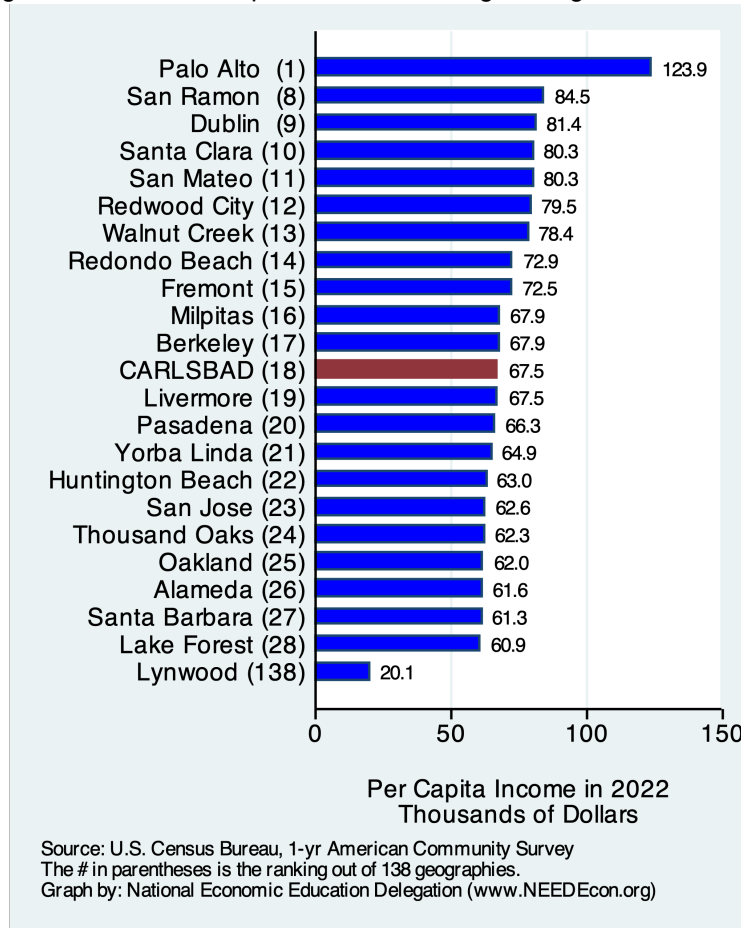
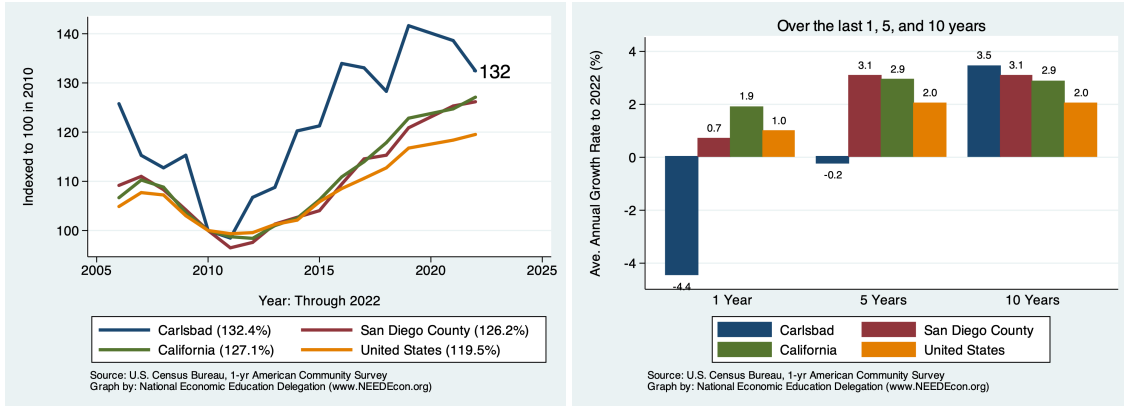


Figure 25: Regional Comparison of Growth over Time



Real Per Capita Income Ranking Among California Cities - w/Comparable Populations

Figure 26: Income Levels

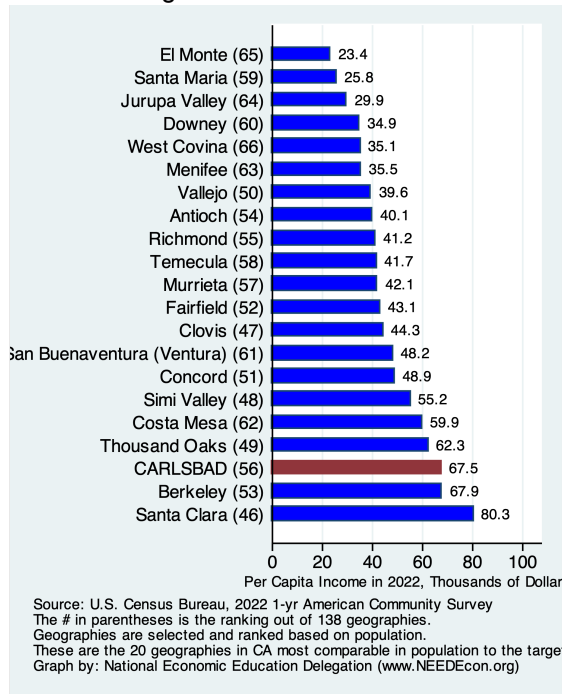
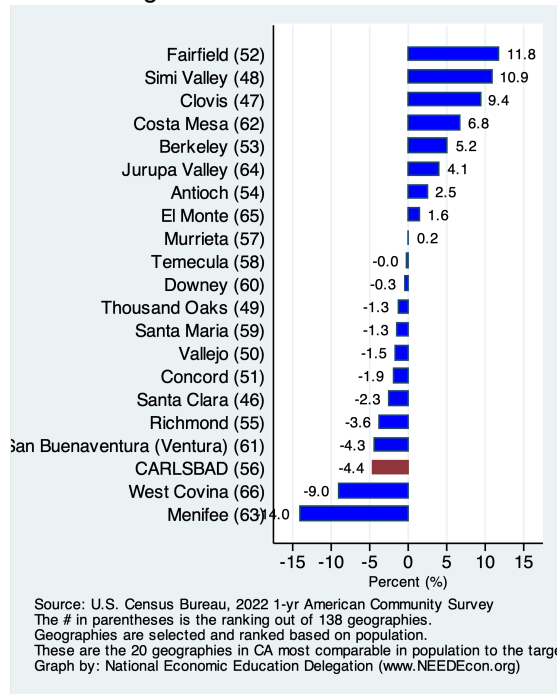


Figure 27: Growth over Time



## Real Per Capita Income Ranking Among Cities in San Diego County

Figure 28: Income Levels

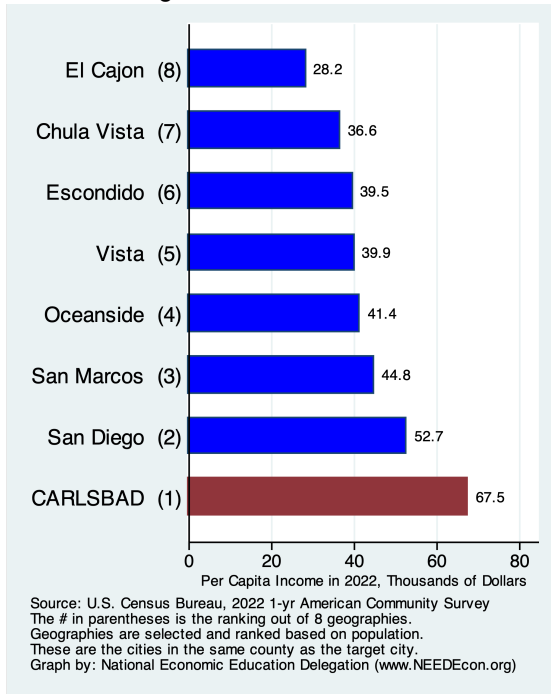


Figure 29: Growth over Time

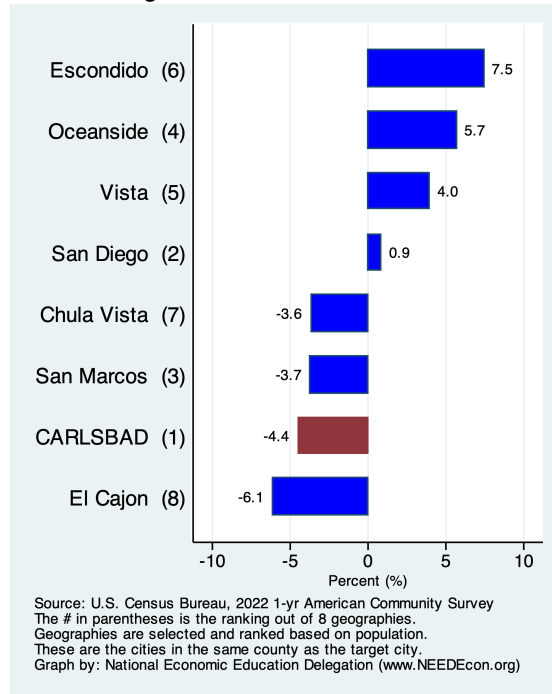
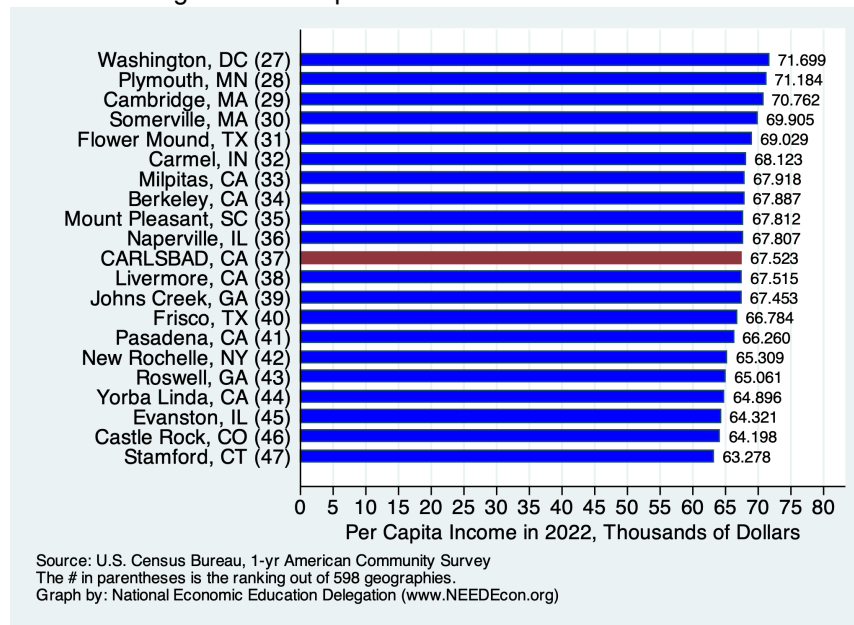


Figure 30: Comparison with All Cities Nationwide



## Poverty and Inequality

### Definition:

The local poverty rate provides an indication of the well-being of those at the bottom of the income distribution. The federal poverty rate measures the proportion of households in the region that are classified as living in poverty. Also included are measures of the extent to which the City's children are impoverished. Measures of the income distribution provide

further evidence on disparities in income in the region and how those disparities have changed over time.

### Why is it important?

It is important to track measures of poverty and inequality to assess the extent of income disparities in the region, with an eye toward understanding how well the local economy is performing for all of its citizens.

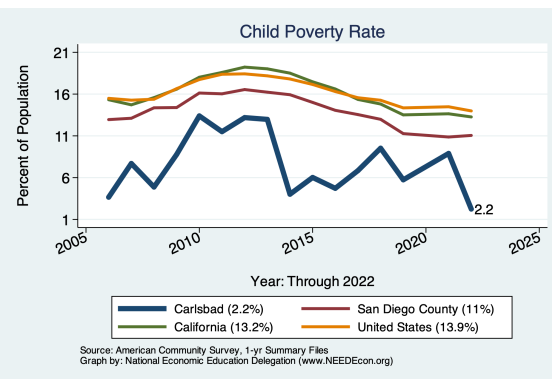
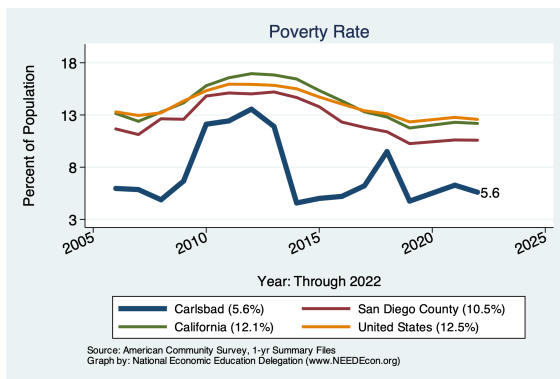


Figure 31: Inequality

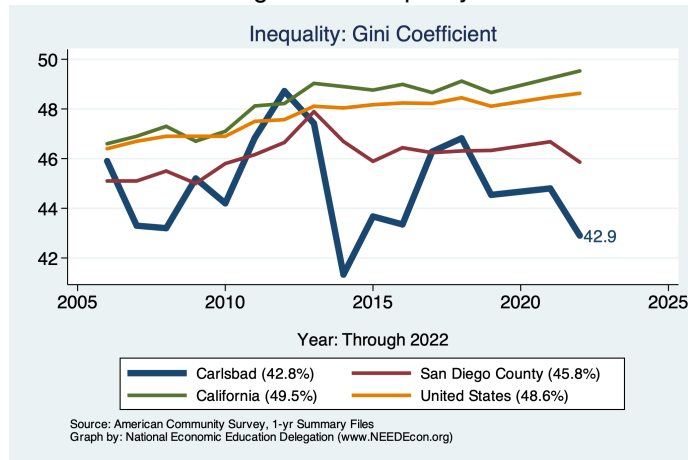




Figure 32: Shares Across the Income Distribution

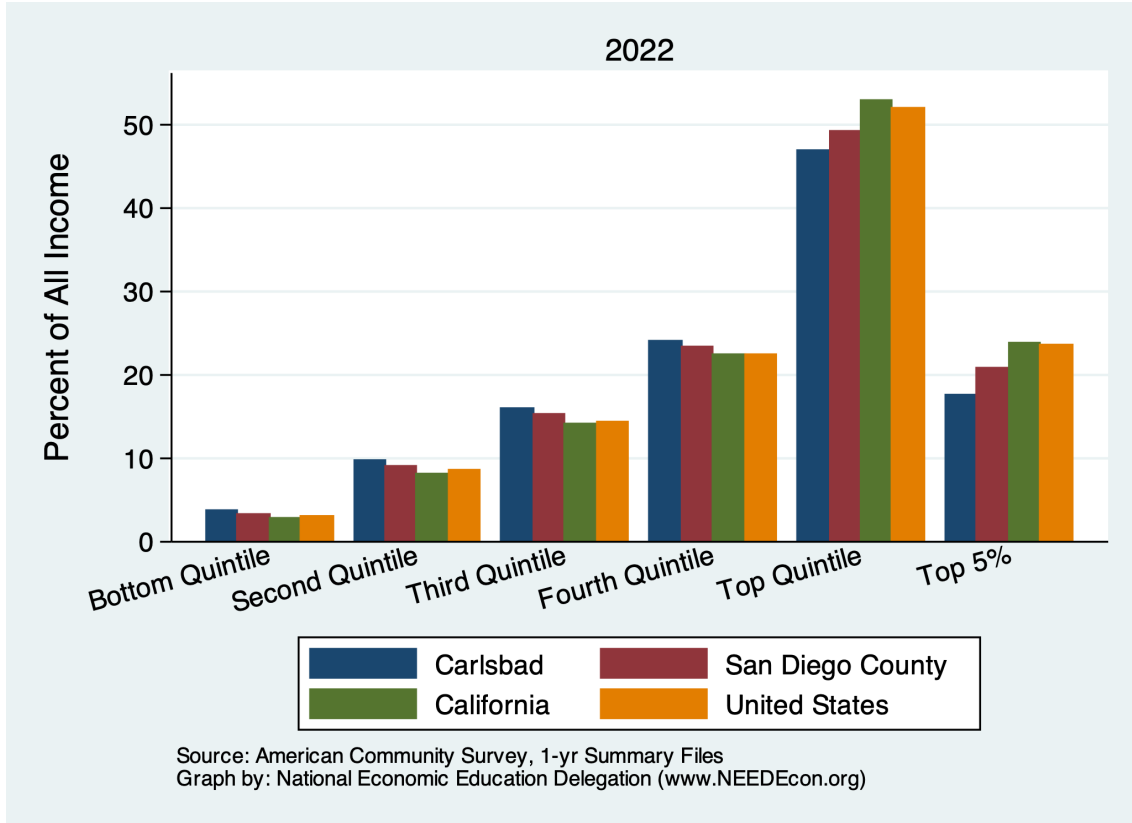
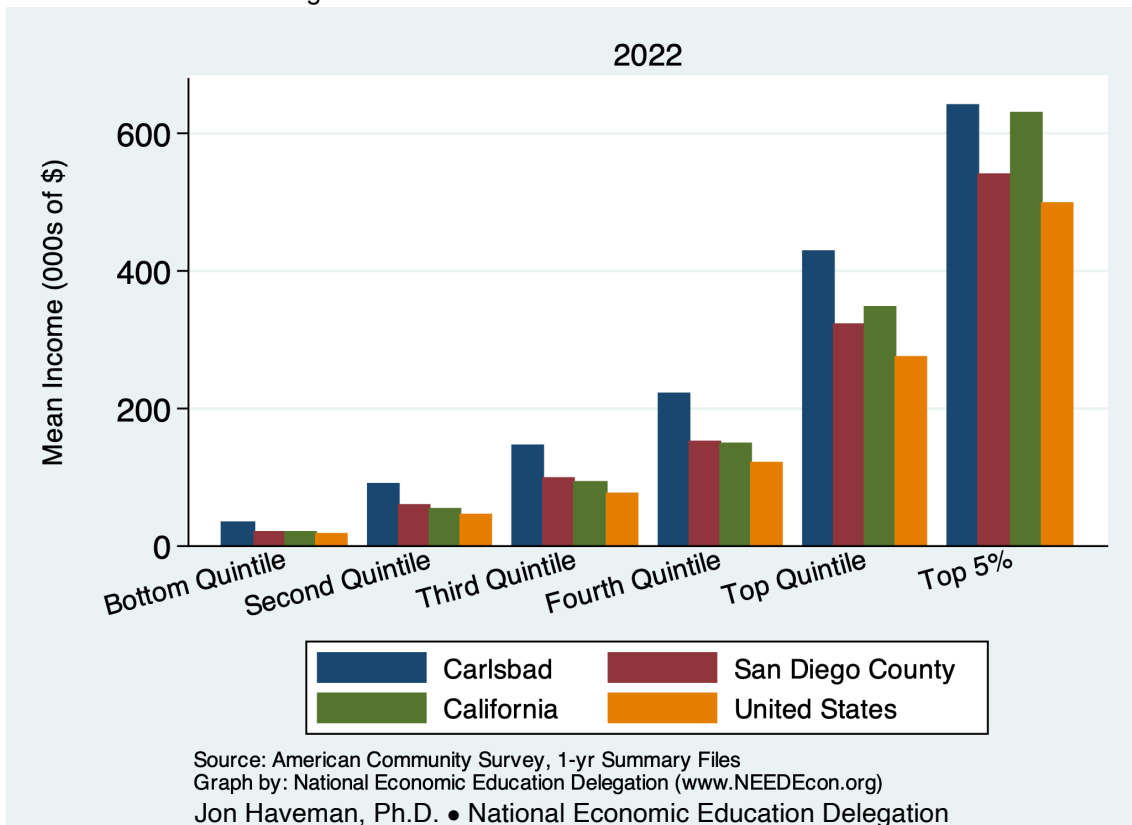


Figure 33: Means Across the Income Distribution



# Housing

## Housing Costs and Affordability

### Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. Housing burden is defined as a household needing to commit more than 30% of their household income toward housing costs. The median value is the amount in the middle. Fifty

percent of units are above the median and 50 percent are below.

### Why is it important?

Housing is one of three fundamental necessities, along with food and clothing. A measure of the cost of housing is an integral part of the measurement of the cost of living in a specific community. This is particularly true in cities and regions throughout the Bay Area, where housing costs are high relative to income.

### Cost of Housing in Carlsbad and Broader Regions

Figure 34: Median Home Prices

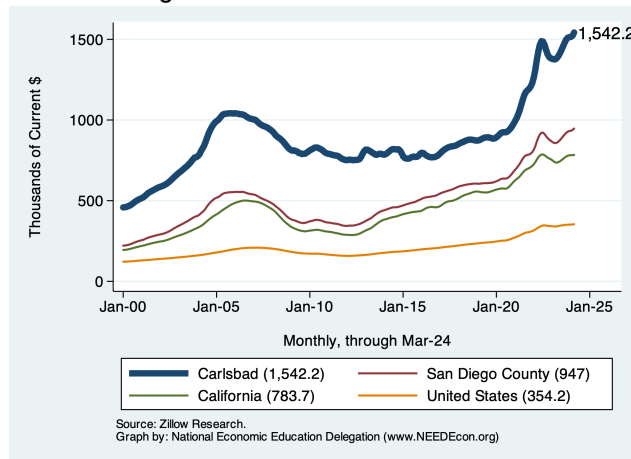
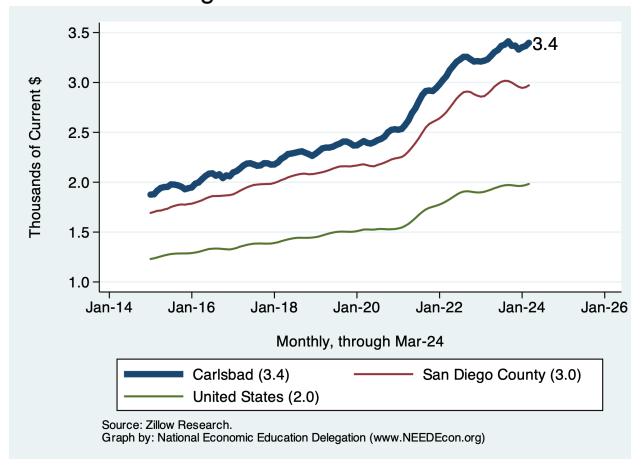


Figure 35: Median Rents



## Housing Ownership in Carlsbad and Broader Regions

Figure 36: Home Ownership Rates

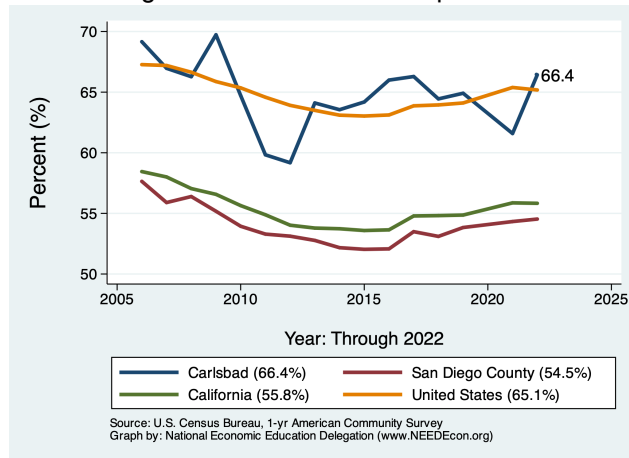


Figure 37: Home Ownership by Age

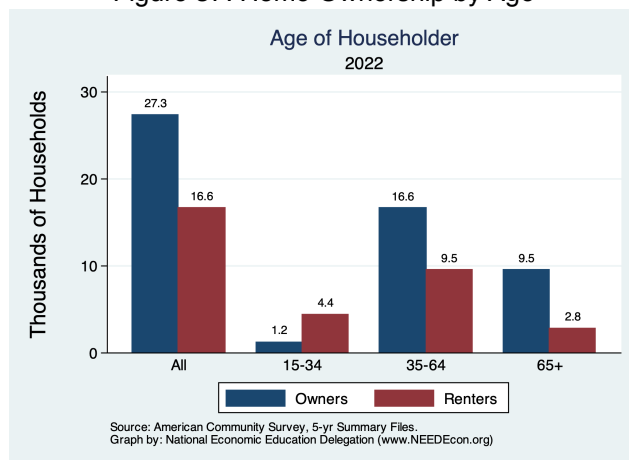


Figure 38: Income by Tenure

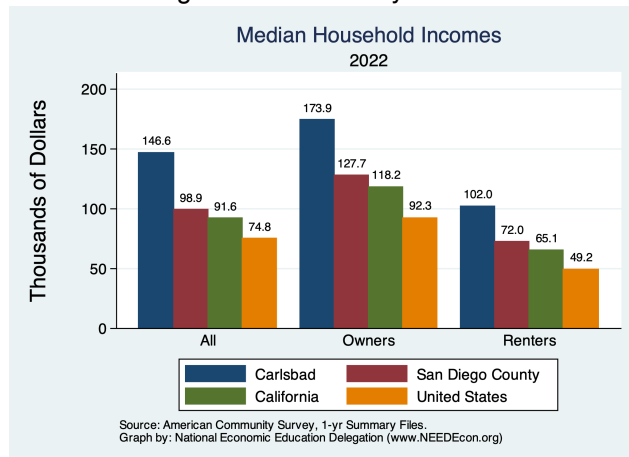


Figure 39: Income Distribution by Tenure

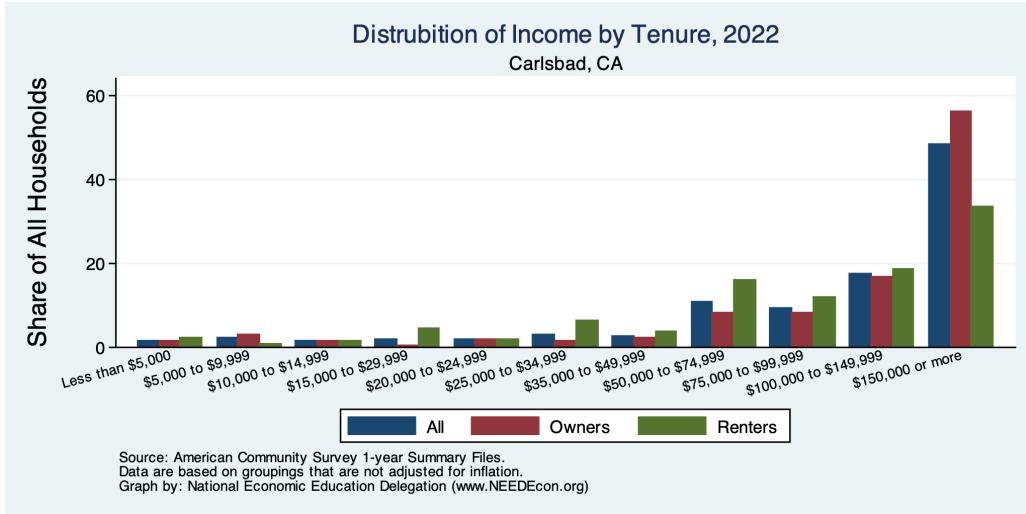


Figure 40: Income Distribution of Home Owners

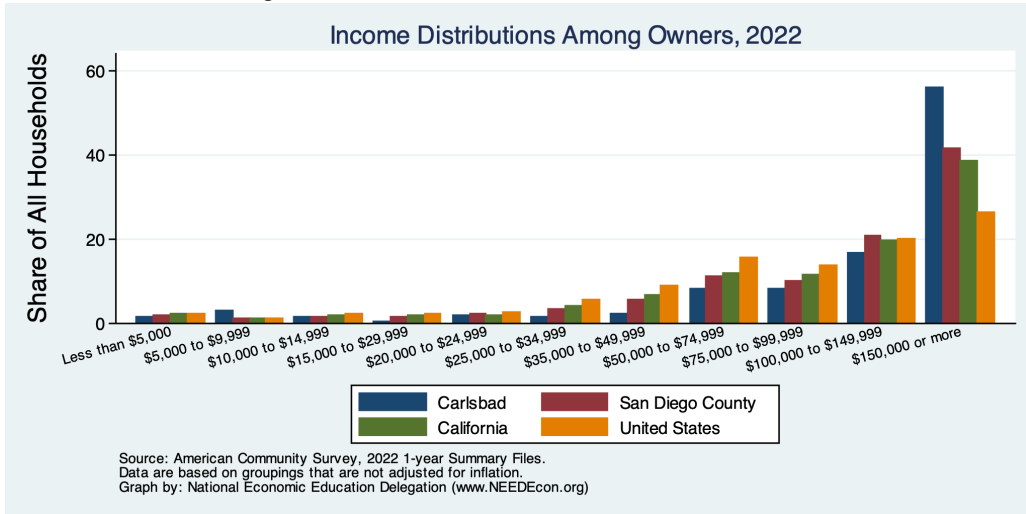
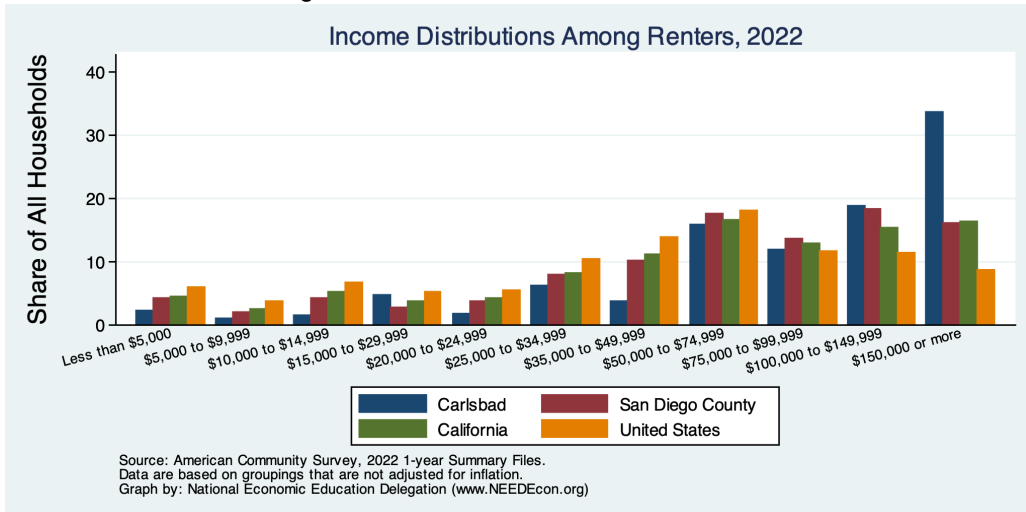
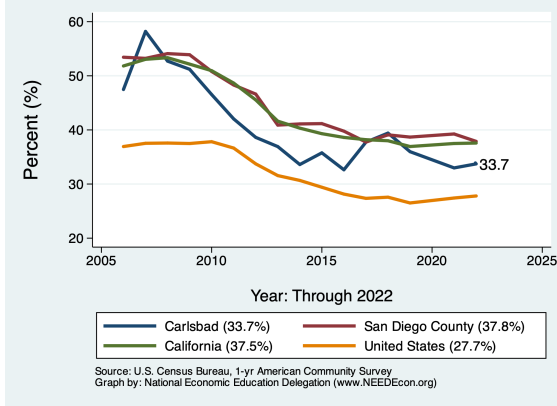


Figure 41: Income Distribution of Renters

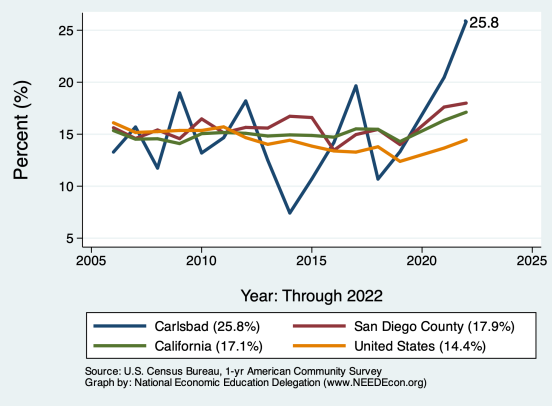


## Housing Burden in Carlsbad and Broader Regions

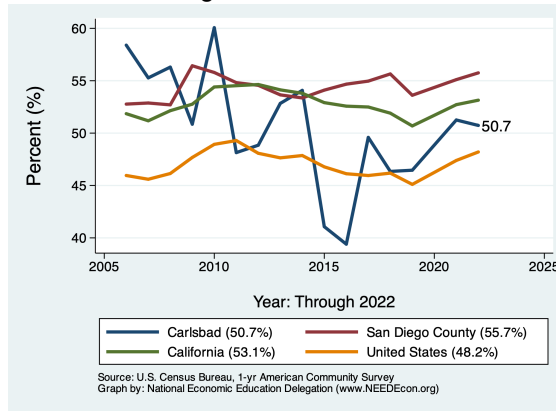
**Figure 42: Home Owners w/ A Mortgage**



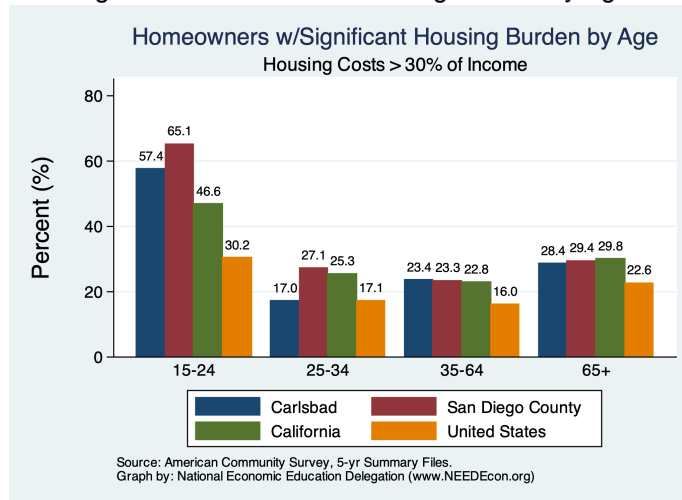
**Figure 43: Home Owners w/o A Mortgage**



**Figure 44: Renters**



**Figure 45: Homeowner Housing Burden by Age**



# Housing Picture

## Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. The median value is the amount in the middle. Fifty percent of units are above the median and 50 percent are below.

## Why is it important?

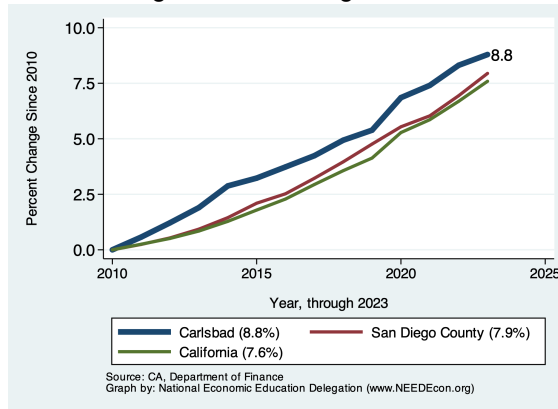
In areas where the rate of population growth exceeds the rate of housing growth, this is likely to reflect a tightening housing market. A tightening housing market will also likely be reflected in lower vacancy rates and higher occupancy rates. It may also be reflected in higher numbers of people per household.

**Table 5. Housing Market Indicators**

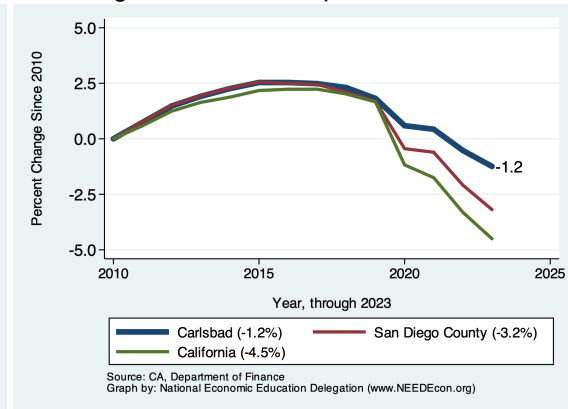
Indicator	2023	2019	2010	% Change from	
				2019	2010
Total Population	114,549.0	113,635.0	105,328.0	0.8	8.8
Total # of Homes	48,601.0	47,080.0	44,673.0	3.2	8.8
# Occupied Units	45,542.0	43,838.0	41,345.0	3.9	10.2
Persons per Household	2.5	2.6	2.5	-3.0	-1.2
Vacancy Rate (%)	6.3	6.9	7.4	-8.6	-15.5

Source: CA DOF; Calculations by the National Economic Education Delegation

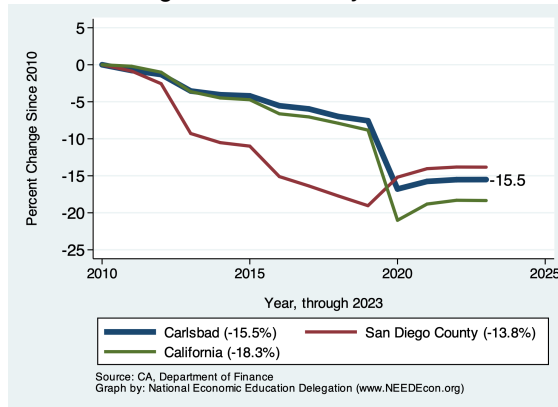
**Figure 46: Housing Growth**



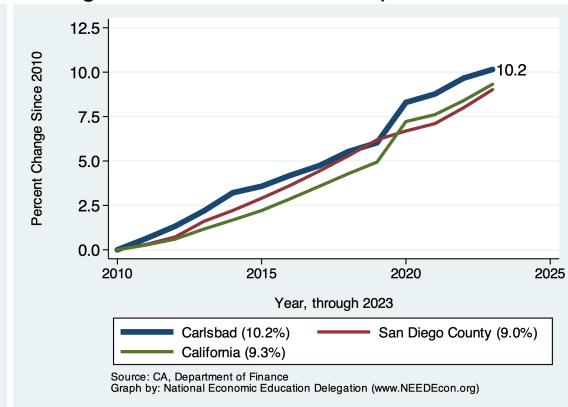
**Figure 47: Persons per Household**



**Figure 48: Vacancy Rates**



**Figure 49: Number of Occupied Units**



## Trends in the Growth of Housing by Housing Type

Figure 50: Single Detached Homes

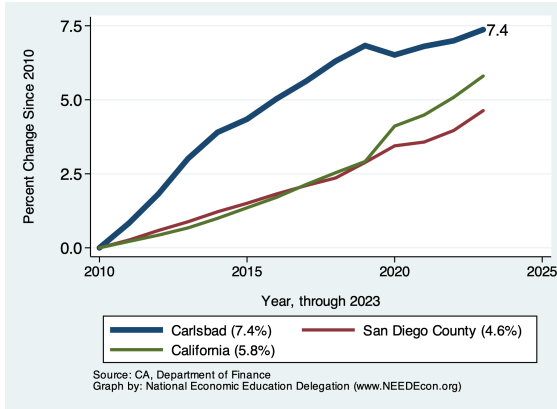


Figure 51: Single Attached Homes

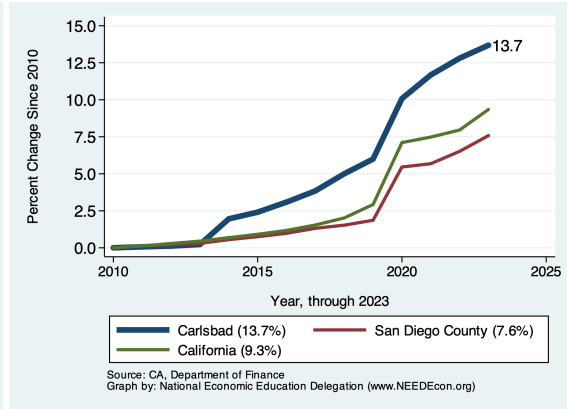


Figure 52: Housing in Buildings with Two to Four Units

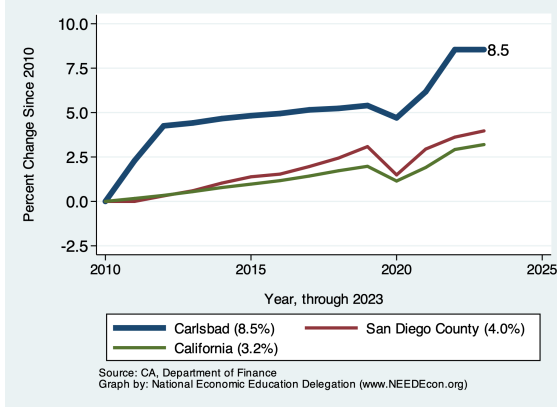
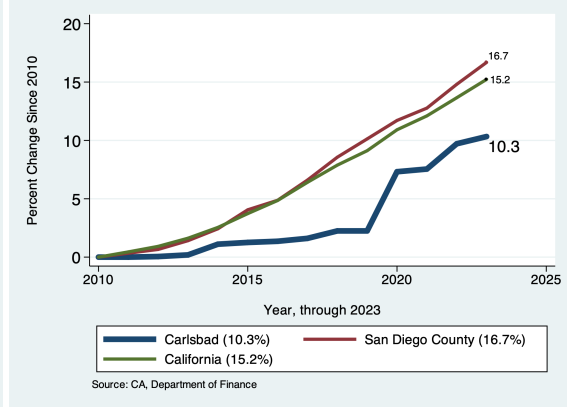


Figure 53: Housing in Buildings with Five or More Units



## Vintage of Residential Housing

### Why is it important?

This section provides evidence on the year in which residential housing in Carlsbad was built. We break it down into owned versus rented residences and provide a comparison across San Diego County and broader regions. A sense of the age of housing in a region provides an indication of the urgency with which a region might pursue additional housing. As the

housing stock ages, an urgency with which renovations and rebuilds are permitted might result. All things equal, more recently constructed housing will be more likely to meet current codes and standards. Remodeling of existing units will be more desirable when existing units are, on average, older.

Figure 54: Distribution of Housing Construction

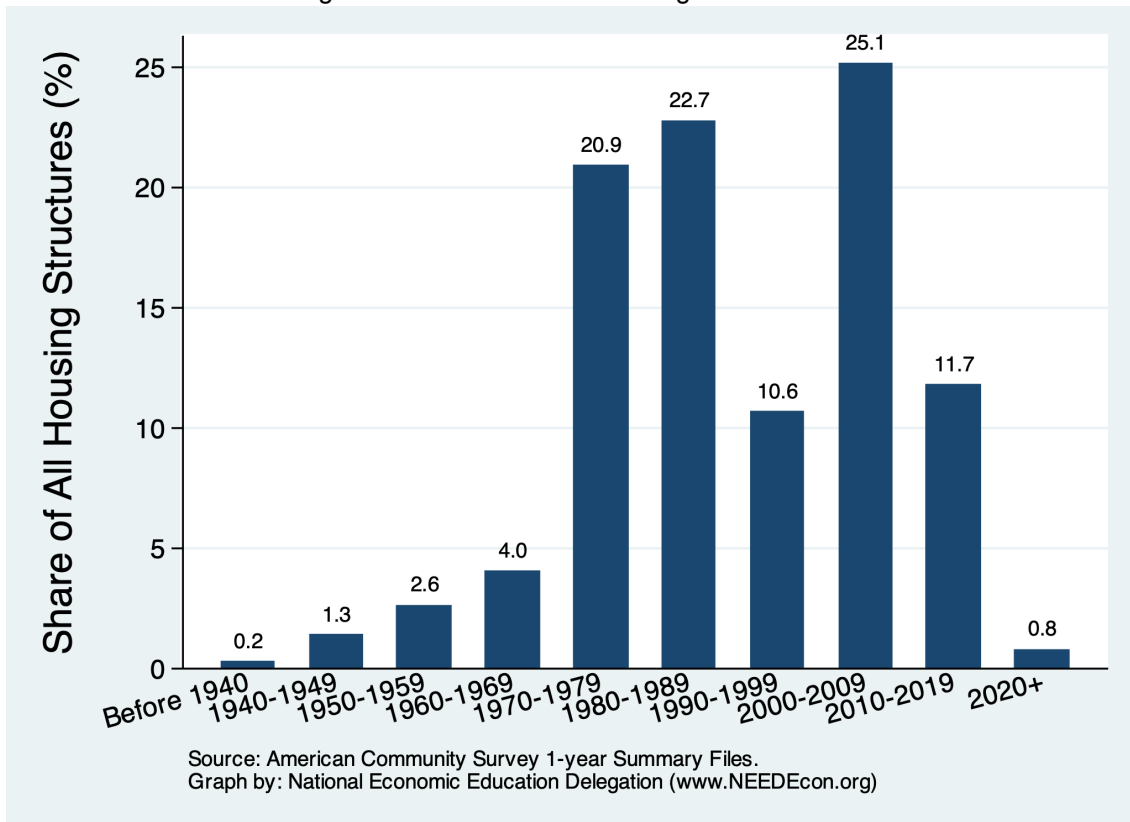




Figure 55: Housing Vintage across Regions

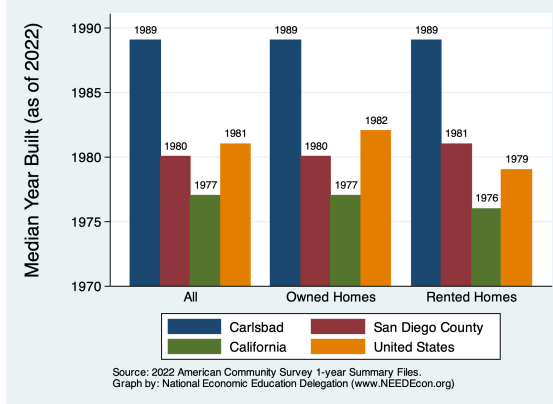


Figure 56: Housing Vintage by Tenure

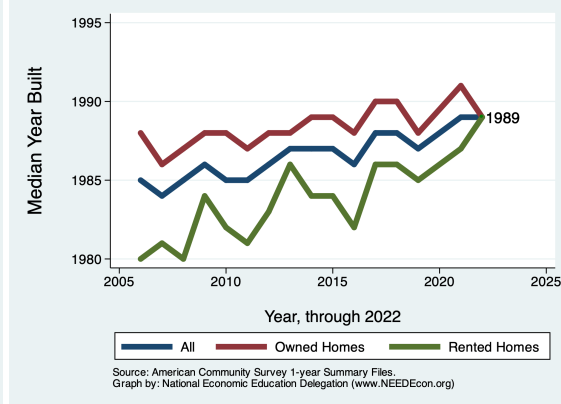


Figure 57: Vintage of Owned Residences

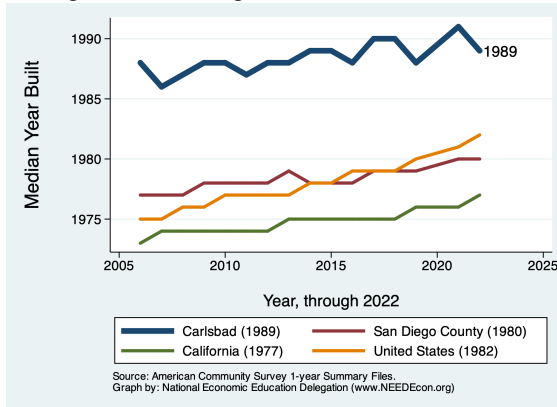


Figure 58: Vintage of Rented Residences

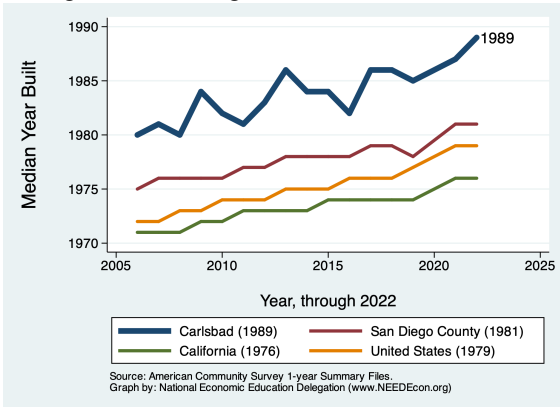
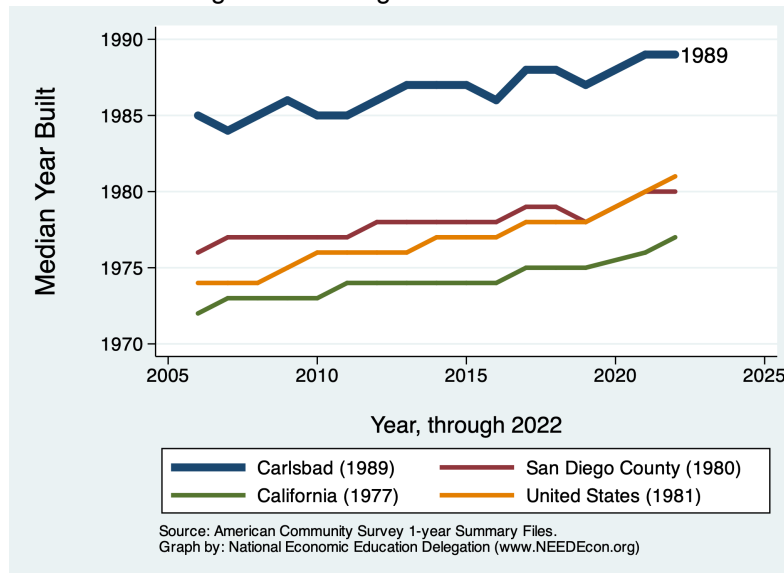


Figure 59: Vintage of All Residences



## Occupation of Residential Housing

### Why is it important?

The duration of residence in a city is important for developing future policies regarding growing the local population. If a region is highly mobile, evidenced by most residences having

been recently occupied, a city might propose policies to reduce that mobility, or ask why the mobility happens. Policies could be put in place to either reduce or increase migration.

Figure 60: Year Current Occupant Moved In

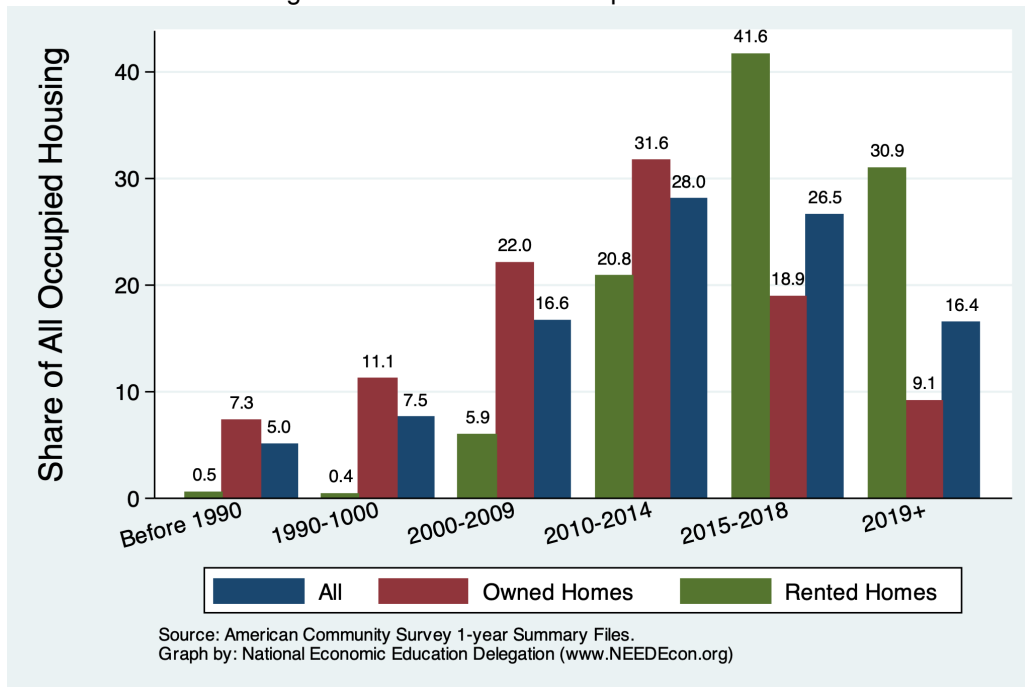


Figure 61: Year Occupied by Current Residents across Regions

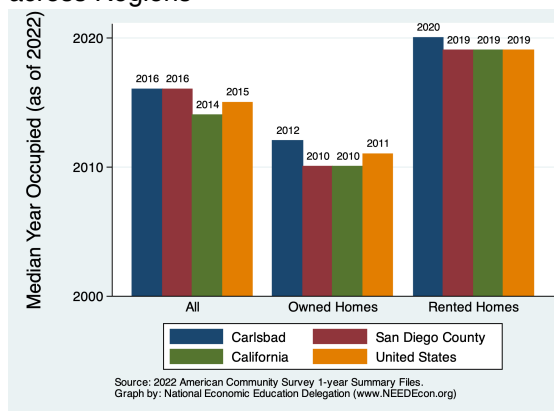


Figure 62: Year Occupied by Current Residents by Tenure

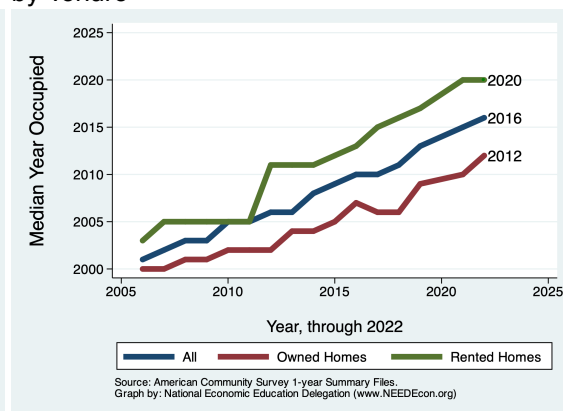


Figure 63: Year Occupied by Current Residents for Owned Housing

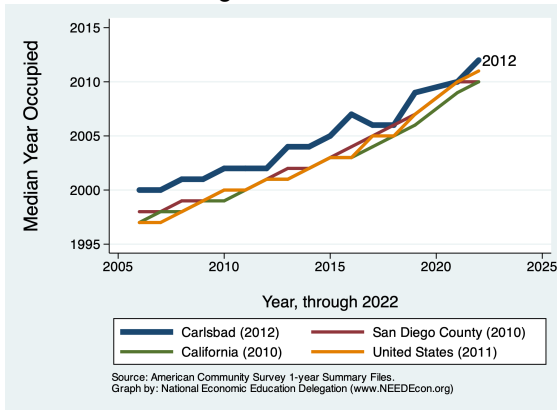


Figure 64: Year Occupied by Current Residents for Rented Housing

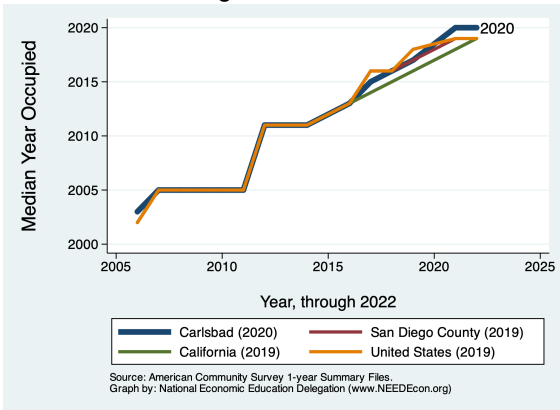
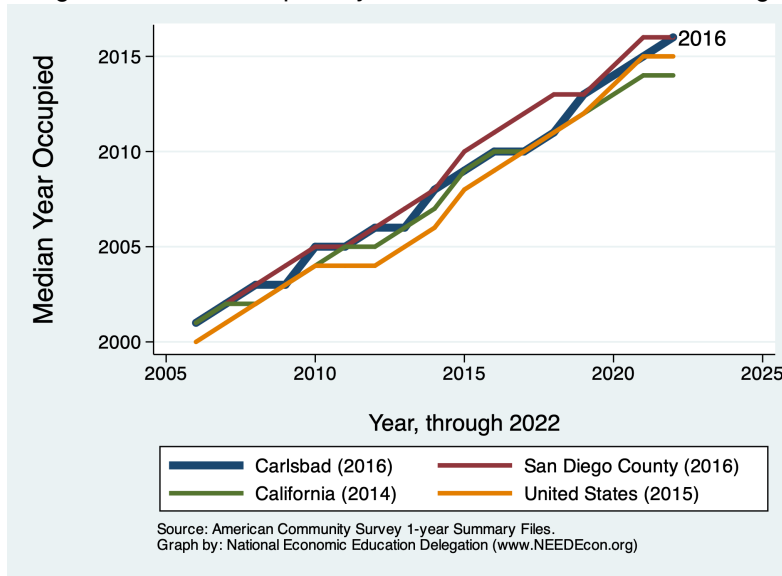


Figure 65: Year Occupied by Current Residents for All Housing



## Residential Permitting

### Definition:

This indicator provides evidence on the number of residential buildings that are permitted for construction each year. Permit data for Carlsbad is compared with data from San Diego County as a whole and broader regions. The statistic provided scales the number of permits by population. This is done to facilitate comparisons across regions.

### Why is it important?

Building permits are the best indicator available of new units coming on the market. In order for a region's population to grow and flourish, new residential properties must be added to the existing stock. Building, both in the City and in the County more generally, is an indication of the extent to which new residences accommodate new residents or are affecting prices through increased supply.

### Carlsbad - Ranking Among Comparables

Figure 66: Number of Units Permitted - Nationwide Comparables (Rank)

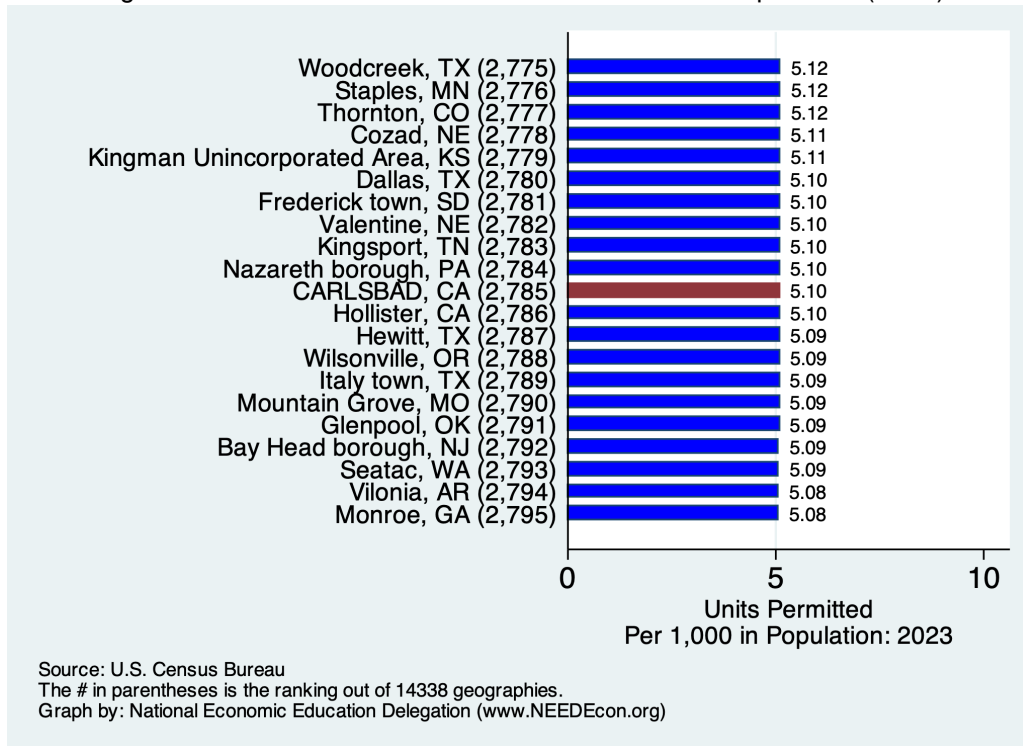
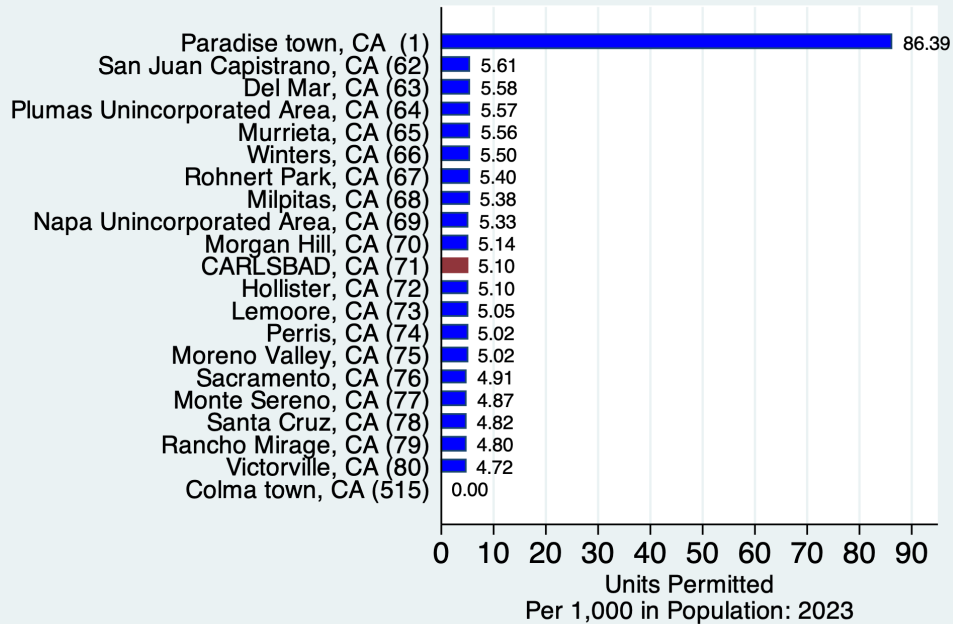
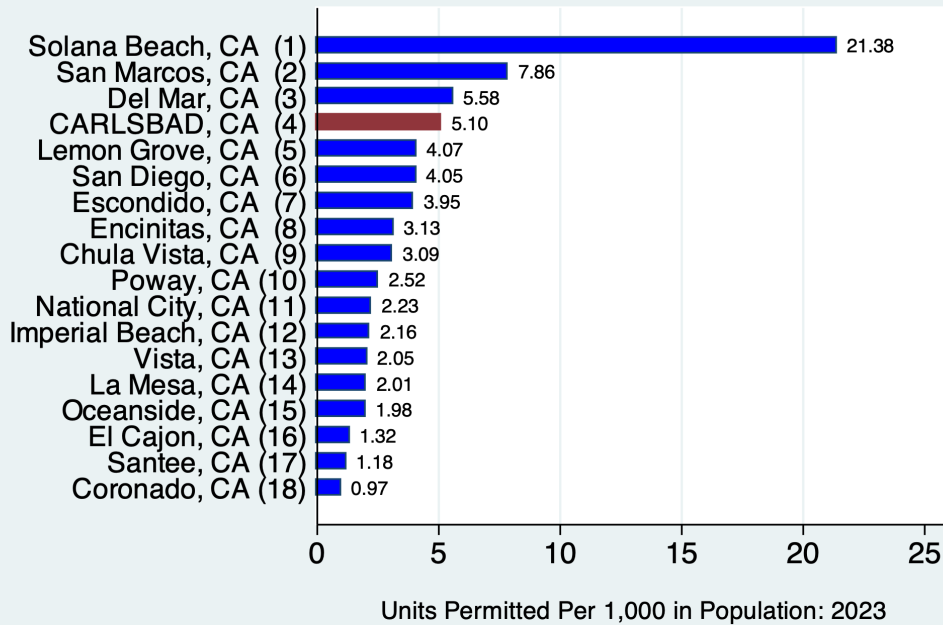


Figure 67: Number of Units Permitted - California Comparables (Rank)



Source: U.S. Census Bureau.  
 The # in parentheses is the ranking out of 515 geographies.  
 Graph by: National Economic Education Delegation ([www.NEEDecon.org](http://www.NEEDecon.org))

Figure 68: Number of Units Permitted - Cities in San Diego County (Rank)



Source: U.S. Census Bureau.  
 The # in parentheses is the ranking out of 18 geographies.  
 Graph by: National Economic Education Delegation ([www.NEEDecon.org](http://www.NEEDecon.org))

## Carlsbad - Permitting Activity

### Annual Units Permitted - Per Capita in Carlsbad

Figure 69: Units Permitted Each Year

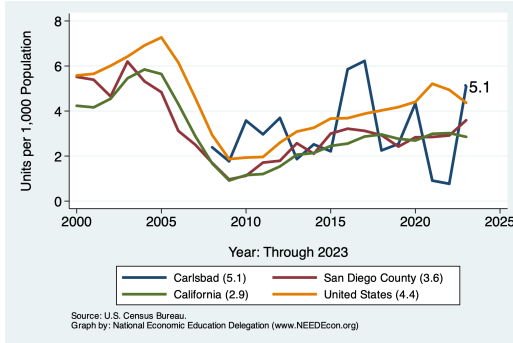
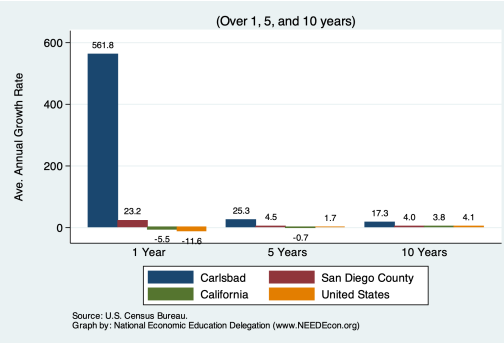


Figure 70: Average Annual Growth in Units Permitted



### Annual Number of Buildings Permitted - Per Capita in Carlsbad

Figure 71: Units Permitted Each Year

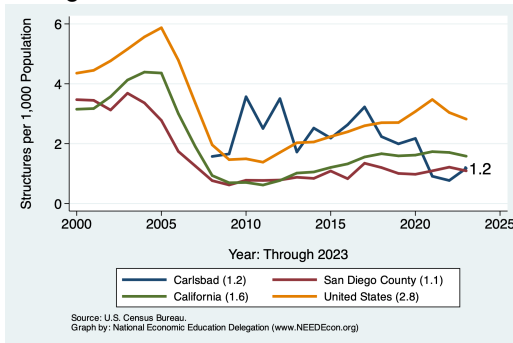
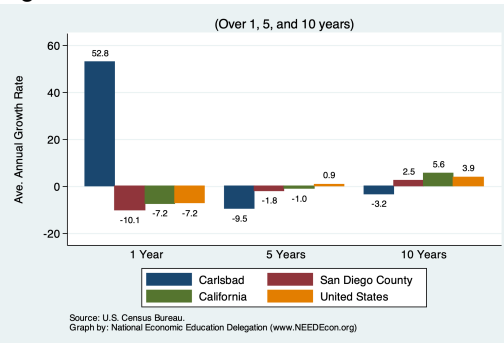


Figure 72: Average Annual Growth in Buildings Permitted



### Annual Value of Property Permitted - Per Capita in Carlsbad

Figure 73: Value Permitted Each Year

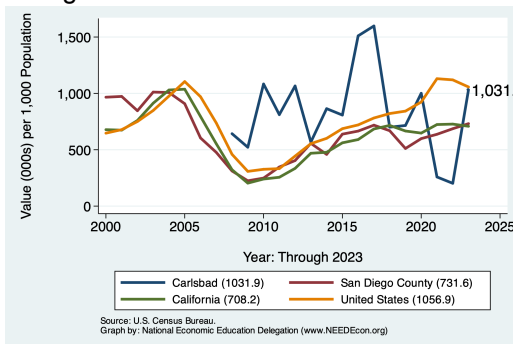
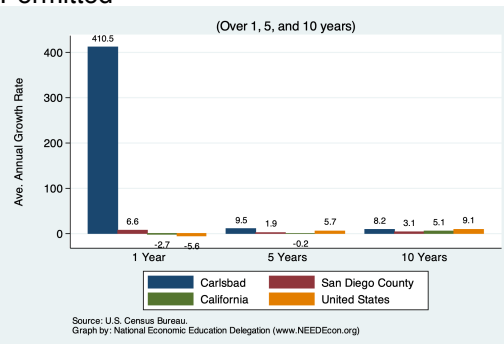


Figure 74: Average Annual Growth in Value Permitted



# Commute Patterns

During the recovery from the Great Recession, the period from 2010 to 2019, the Bay Area economy, and Silicon Valley in particular, has been growing at a pace roughly double that of the state as a whole and triple that of the nation. This growth has precipitated a tight hous-

ing market and also brought about some significant changes in commute patterns, many of which have been reversed by the pandemic. Recent years have seen significant changes in both the mode of transportation and commute times.

## Mode of Transportation

Figure 75: Percent of Workers Commuting by Car Alone

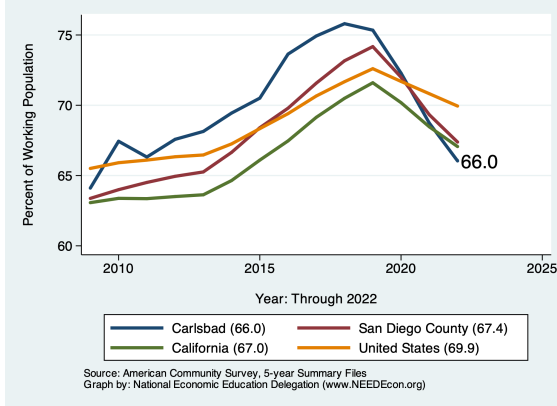


Figure 76: Percent of Workers Commuting by Carpool

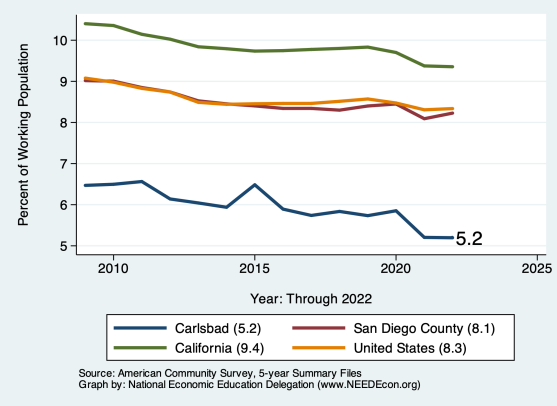


Figure 77: Percent of Workers using Public Transportation

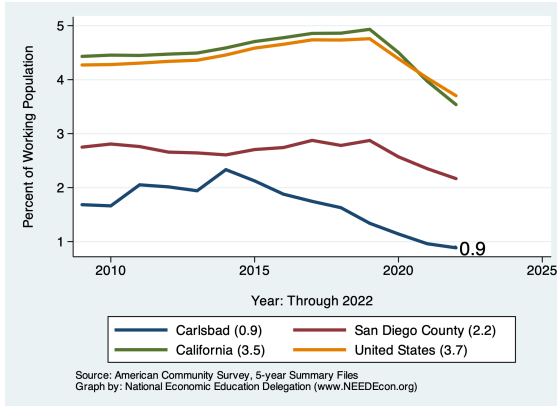
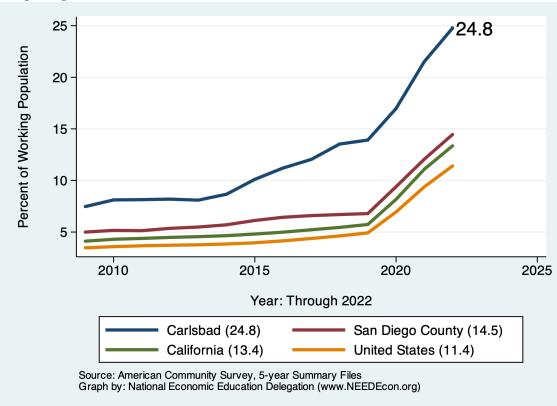


Figure 78: Percent of Workers Who Work From Home



The first table on this page presents data for those who LIVE in Carlsbad. The second provides data on those who work, but do not necessarily live in Carlsbad. The final two columns provide for a comparison of commute mode choices of people locally with those in California more broadly.

**Table 6. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK**

Mode of Transit	Male		Female		All Workers		All of CA
	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van:	22,058	71.7	17,440	69.1	39,498	71.2	78.0
Drove Alone	20,551	66.8	16,066	63.6	36,617	66.0	68.4
Carpooled:	1,507	4.9	1,374	5.4	2,881	5.2	9.5
In 2-person carpool	1,327	4.3	1,041	4.1	2,368	4.3	6.9
In 3-person carpool	107	0.3	130	0.5	237	0.4	1.5
In 4-or-more-person carpool	73	0.2	203	0.8	276	0.5	1.1
Public Transportation (excl Taxi):	389	1.3	102	0.4	491	0.9	3.6
Bus or Trolley Bus	151	0.5	50	0.2	201	0.4	2.3
Streetcar or Trolley Car	13	0.0	0	0.0	13	0.0	0.8
Subway or Elevated	212	0.7	52	0.2	264	0.5	0.3
Railroad	13	0.0	0	0.0	13	0.0	0.2
Ferryboat	0	0.0	0	0.0	0	0.0	0.1
Bicycle	186	0.6	48	0.2	234	0.4	0.7
Walked	513	1.7	186	0.7	699	1.3	2.4
Taxicab, Motorcycle, or other	448	1.5	225	0.9	673	1.2	1.7
Worked at Home	7,152	23.3	6,579	26.1	13,731	24.8	13.6
<b>Total:</b>	30,746	100.0	24,580	97.3	55,326	99.8	

Source: 2022 5-year American Community Survey, Summary File

**Table 7. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK FOR WORKPLACE GEOGRAPHY**

Mode of Transit	Male		Female		All Workers		All of CA
	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van:	33,939	68.9	28,401	74.2	62,340	74.7	75.3
Drove Alone	30,385	61.7	25,096	65.6	55,481	66.5	65.5
Carpooled:	3,554	7.2	3,305	8.6	6,859	8.2	9.8
In 2-person carpool	2,801	5.7	2,591	6.8	5,392	6.5	7.0
In 3-person carpool	469	1.0	494	1.3	963	1.2	1.7
In 4-or-more-person carpool	284	0.6	220	0.6	504	0.6	1.2
Public Transportation (excl Taxi):	188	0.4	0	0.0	188	0.2	2.6
Bus or Trolley Bus	188	0.4	0	0.0	188	0.2	1.8
Streetcar or Trolley Car	0	0.0	0	0.0	0	0.0	0.5
Subway or Elevated	0	0.0	0	0.0	0	0.0	0.2
Railroad	0	0.0	0	0.0	0	0.0	0.1
Ferryboat	0	0.0	0	0.0	0	0.0	0.1
Bicycle	453	0.9	236	0.6	689	0.8	0.7
Walked	247	0.5	334	0.9	581	0.7	2.4
Taxicab, Motorcycle, or other	723	1.5	392	1.0	1,115	1.3	1.7
Worked at Home	9,675	19.7	8,900	23.3	18,575	22.2	17.2
<b>Total:</b>	45,225	91.9	38,263	100.0	83,488	100.0	

Source: 2022 1-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.



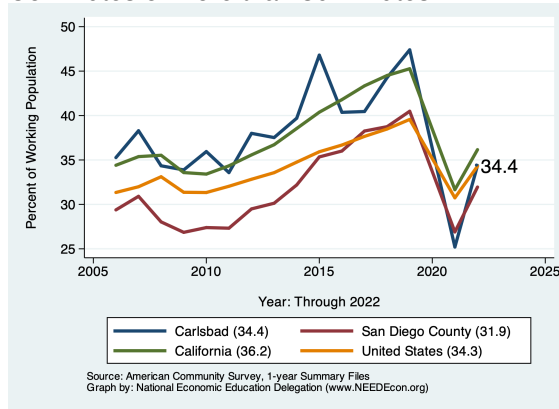
# Commute Times for Employed Residents

**Table 8. SEX OF WORKERS BY TRAVEL TIME TO WORK**

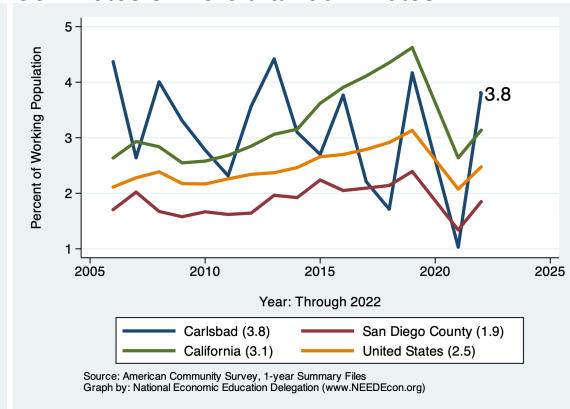
Mode of Transit	Male		Female		All Workers		All of CA
	#	(%)	#	(%)	#	(%)	(%)
Less than 5 minutes	83	0.3	145	0.6	228	0.5	2.1
5 to 9 minutes	802	2.9	803	3.4	1,605	3.2	7.8
10 to 14 minutes	3,015	10.8	2,751	11.8	5,766	11.6	12.4
15 to 19 minutes	3,816	13.7	2,404	10.3	6,220	12.5	15.4
20 to 24 minutes	2,239	8.0	1,932	8.3	4,171	8.4	14.8
25 to 29 minutes	692	2.5	534	2.3	1,226	2.5	6.4
30 to 34 minutes	2,855	10.2	2,915	12.5	5,770	11.6	15.2
35 to 39 minutes	53	0.2	315	1.4	368	0.7	2.9
40 to 44 minutes	1,184	4.2	1,020	4.4	2,204	4.4	4.1
45 to 59 minutes	2,749	9.8	1,591	6.8	4,340	8.7	8.2
60 to 89 minutes	2,144	7.7	390	1.7	2,534	5.1	7.2
90 or more minutes	1,348	4.8	544	2.3	1,892	3.8	3.6
<b>Total:</b>	<b>20,980</b>	<b>75.1</b>	<b>15,344</b>	<b>65.8</b>	<b>36,324</b>	<b>73.0</b>	

Source: 2022 1-year American Community Survey, Summary File

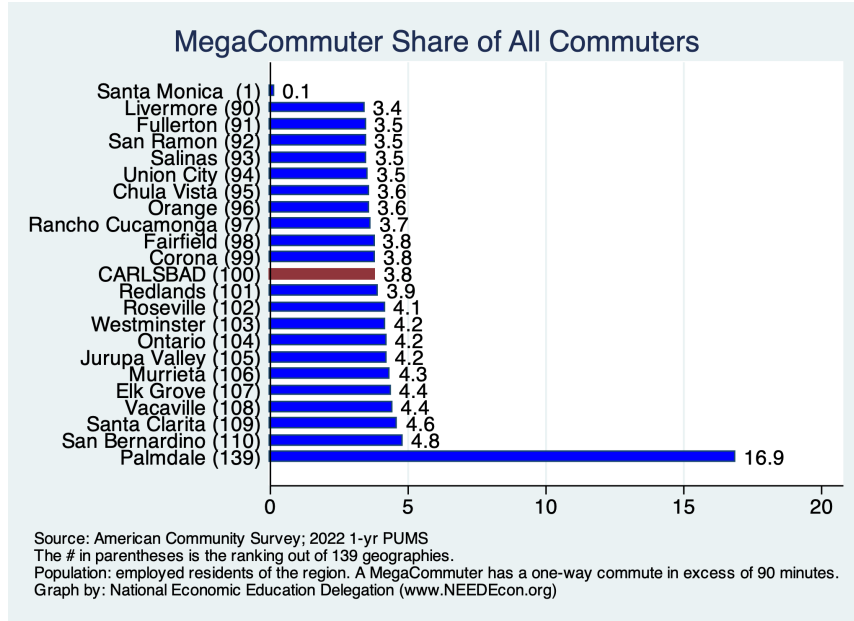
**Figure 79: Percent of Employed Population With Commutes of More than 30 Minutes**



**Figure 80: Percent of Employed Population With Commutes of More than 90 Minutes**



**Figure 81: Rank: Share of MegaCommuters Across Similar Geographies**



Source: American Community Survey; 2022 1-yr PUMS  
 The # in parentheses is the ranking out of 139 geographies.  
 Population: employed residents of the region. A MegaCommuter has a one-way commute in excess of 90 minutes.  
 Graph by: National Economic Education Delegation (www.NEEDecon.org)

## Commute Times for Those Employed in the City

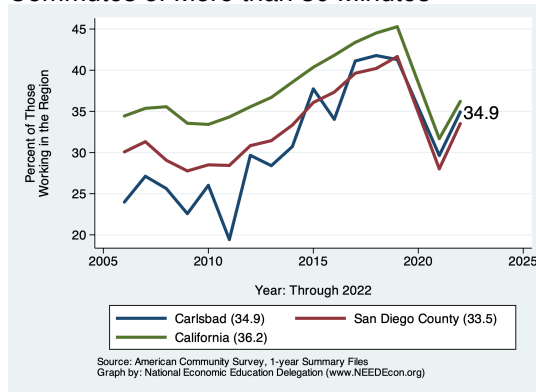
**Table 9. SEX OF WORKERS BY TRAVEL TIME TO WORK FOR WORKPLACE GEOGRAPHY**

Mode of Transit	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Less than 5 minutes	149	0.3	223	0.7	372	0.5	2.1
5 to 9 minutes	1,024	2.3	1,048	3.1	2,072	2.8	7.8
10 to 14 minutes	4,474	10.0	3,687	11.0	8,161	10.9	12.4
15 to 19 minutes	4,810	10.7	5,316	15.8	10,126	13.6	15.3
20 to 24 minutes	6,616	14.8	6,273	18.7	12,889	17.3	14.8
25 to 29 minutes	3,838	8.6	1,424	4.2	5,262	7.1	6.4
30 to 34 minutes	5,816	13.0	4,879	14.5	10,695	14.3	15.2
35 to 39 minutes	1,401	3.1	717	2.1	2,118	2.8	2.9
40 to 44 minutes	1,515	3.4	1,949	5.8	3,464	4.6	4.1
45 to 59 minutes	2,946	6.6	2,288	6.8	5,234	7.0	8.2
60 to 89 minutes	1,726	3.8	1,380	4.1	3,106	4.2	7.2
90 or more minutes	1,235	2.8	179	0.5	1,414	1.9	3.6
<b>Total:</b>	<b>35,550</b>	<b>79.3</b>	<b>29,363</b>	<b>87.5</b>	<b>64,913</b>	<b>87.1</b>	

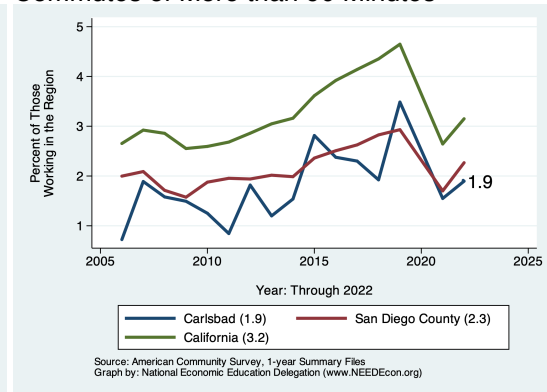
Source: 2022 1-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

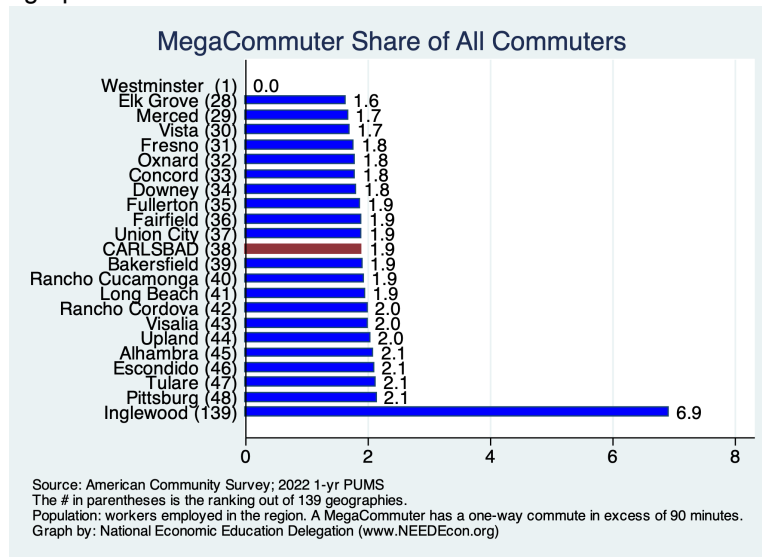
**Figure 82: Percent of Local Employees With Commutes of More than 30 Minutes**



**Figure 83: Percent of Local Employees With Commutes of More than 90 Minutes**



**Figure 84: Rank: Share of MegaCommuters Across Similar Geographies**



## Place of Work

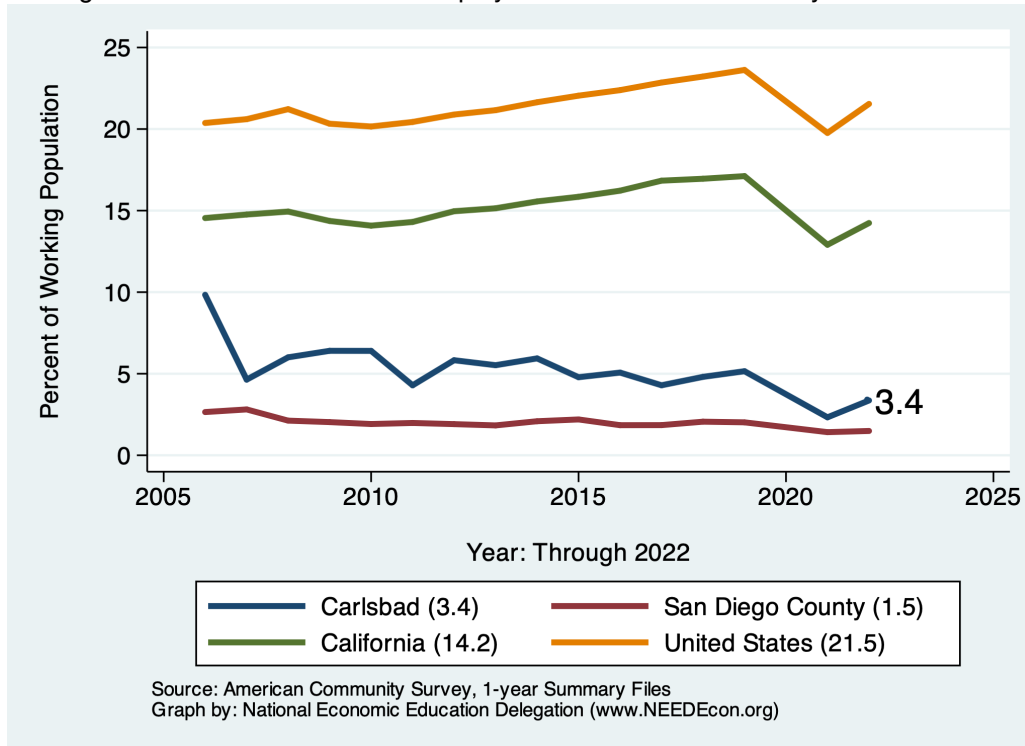
This section provides evidence on where workers living in Carlsbad work. As evidenced in the first table, some of Carlsbad’s employed workers work in the City, but many do not. The first table and graph pair provide evidence at the county level while the second provide evidence with regard to working outside of the Carlsbad city boundary.

**Table 10. SEX OF WORKERS BY PLACE OF WORK—STATE AND COUNTY LEVEL**

Place of Work	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Worked in state of residence:	30,465	97.1	23,896	87.0	54,361	95.0	99.6
Worked in county of residence	29,024	92.5	23,415	85.2	52,439	91.7	85.3
worked outside of county of residence	1,441	4.6	481	1.8	1,922	3.4	14.3
Worked outside state of residence	190	0.6	348	1.3	538	0.9	0.4
<b>Total:</b>	30,655	97.7	24,244	88.2	54,899	96.0	

Source: 2022 1-year American Community Survey, Summary File

**Figure 85: Percent of Workers Employed Outside of Their County of Residence**

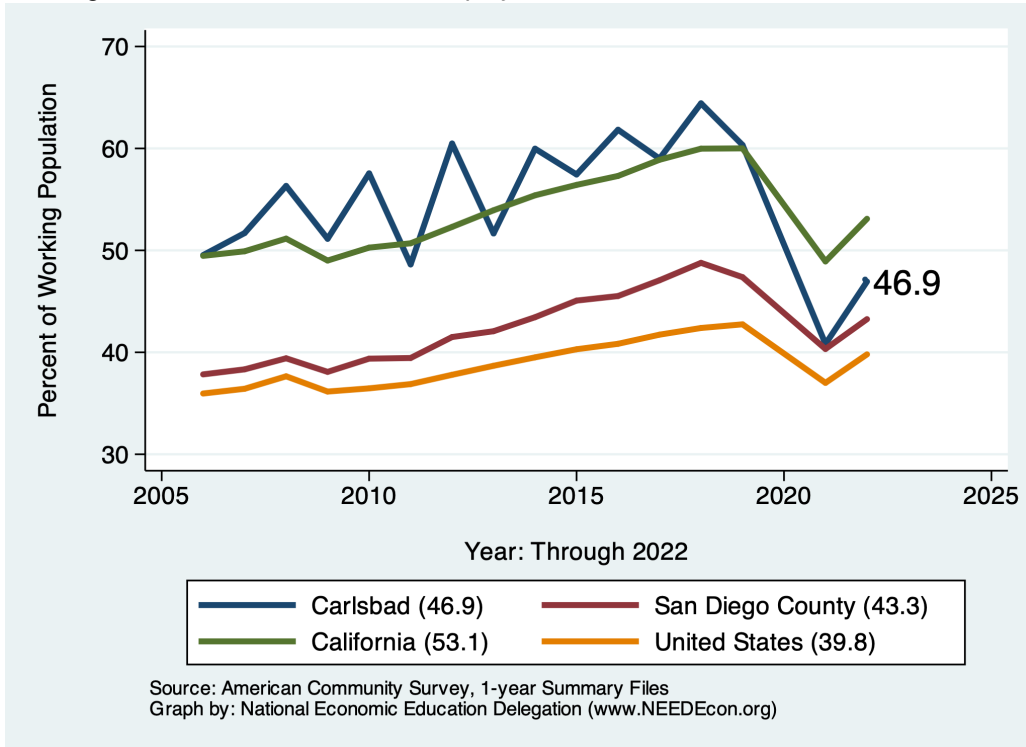


**Table 11. SEX OF WORKERS BY PLACE OF WORK-PLACE LEVEL**

Place of Work	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Living in a place:	30,655	97.7	24,244	88.2	54,899	96.0	95.8
Worked in place of residence	14,996	47.8	13,054	47.5	28,050	49.0	42.3
Worked outside place of residence	15,659	49.9	11,190	40.7	26,849	46.9	53.4
Not living in a place	0	0.0	0	0.0	0	0.0	4.2
<b>Total:</b>	30,655	97.7	24,244	88.2	54,899	96.0	

Source: 2022 1-year American Community Survey, Summary File

**Figure 86: Percent of Workers Employed Outside of Their Place of Residence**



## Commute Mode by Income

**Table 12. MEDIAN EARNINGS IN THE PAST 12 MONTHS  
BY MEANS OF TRANSPORTATION TO WORK**

	City	California	Ratio	United States	
	Median	Median		Median	Ratio
Car, truck, or van - drove alone	70,664	48,335	82.9	45,677	81.6
Car, truck, or van - carpooled	71,409	35,926	112.7	34,518	109.1
Public transportation (excluding taxicab)	40,471	34,625	66.3	41,443	51.5
Walked	30,861	30,552	57.3	27,247	59.8
Taxicab, motorcycle, bicycle, or other means	84,213	40,631	117.5	36,218	122.7
Worked from home	107,244	79,738	76.2	69,180	81.8
<b>Total:</b>	87,890	49,818	176.4	46,365	189.6

Source: 2022 1-year American Community Survey, Summary File

Notes: 1) Ratio = the ratio of the regional median to either the CA or US median, relative to the Total ratio.

Values above 100 imply a high local median. Values below 100 imply a low local median.

For example, a value of 200 means that the local mean is 2x higher than would be expected.

For "Total:", ratio is simply the ratio of the medians.

2) For regions with more than one geography, the medians are averages weighted by working population.

**Table 13. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS**

Mode of Transit	< \$25,000		\$25,000-\$74,999		\$75,000+		All		All of CA
	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	7,664	54.5	9,606	61.2	17,110	63.1	36,617	66.1	68.4
Car, Truck, or Van: Carpooled	1,271	9.0	431	2.7	985	3.6	2,881	5.2	9.5
Public Transportation (excl Taxi)	188	1.3	44	0.3	222	0.8	491	0.9	3.6
Walked	272	1.9	64	0.4	264	1.0	699	1.3	2.4
Taxicab, Motorcycle, or other	188	1.3	206	1.3	382	1.4	907	1.6	2.4
Worked at Home	2,318	16.5	2,443	15.6	8,148	30.1	13,731	24.8	13.6
<b>Total:</b>	11,901	84.7	12,794	81.6	27,111		55,326	99.8	100.0

Source: 2022 5-year American Community Survey, Summary File

**Table 14. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS FOR  
WORKPLACE GEOGRAPHY**

Mode of Transit	< \$25,000		\$25,000-\$74,999		\$75,000+		All		All of CA
	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	13,696	56.7	17,406	71.7	20,001	62.5	57,244	68.6	68.5
Car, Truck, or Van: Carpooled	2,186	9.1	1,708	7.0	1,344	4.2	5,974	7.2	9.5
Public Transportation (excl Taxi)	235	1.0	124	0.5	97	0.3	477	0.6	3.6
Walked	411	1.7	129	0.5	222	0.7	837	1.0	2.4
Taxicab, Motorcycle, or other	363	1.5	229	0.9	598	1.9	1,379	1.7	2.4
Worked at Home	2,318	9.6	2,443	10.1	8,148	25.4	13,731	16.4	13.6
<b>Total:</b>	19,209	79.5	22,039	90.7	30,410	95.0	79,642	95.4	

Source: 2022 5-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

## Commute Mode by Poverty Status

**Table 15. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS**

Mode of Transit	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA (%)
	#	(%)	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van: Drove Alone	1,196	41.3	1,361	43.4	34,060	64.9	36,617	64.0	68.7
Car, Truck, or Van: Carpooled	491	17.0	66	2.1	2,324	4.4	2,881	5.0	9.5
Public Transportation (excl Taxi)	13	0.4	110	3.5	368	0.7	491	0.9	3.6
Walked	13	0.4	189	6.0	497	0.9	699	1.2	2.1
Taxicab, Motorcycle, or other	60	2.1	37	1.2	810	1.5	907	1.6	2.4
Worked at Home	358	12.4	320	10.2	13,051	24.9	13,729	24.0	13.6
<b>Total:</b>	<b>2,131</b>	<b>73.7</b>	<b>2,083</b>	<b>66.5</b>	<b>51,110</b>	<b>97.3</b>	<b>55,324</b>	<b>96.7</b>	

Source: 2022 5-year American Community Survey, Summary File

**Table 16. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS FOR WORKPLACE GEOGRAPHY**

Mode of Transit	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA (%)
	#	(%)	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van: Drove Alone	2,543	61.3	2,304	55.1	52,397	70.5	57,244	70.7	68.7
Car, Truck, or Van: Carpooled	744	17.9	274	6.6	4,956	6.7	5,974	7.4	9.5
Public Transportation (excl Taxi)	55	1.3	40	1.0	382	0.5	477	0.6	3.6
Walked	17	0.4	213	5.1	607	0.8	837	1.0	2.1
Taxicab, Motorcycle, or other	104	2.5	32	0.8	1,243	1.7	1,379	1.7	2.4
Worked at Home	358	8.6	320	7.7	13,051	17.6	13,729	16.9	13.6
<b>Total:</b>	<b>3,821</b>	<b>92.1</b>	<b>3,183</b>	<b>76.2</b>	<b>72,636</b>	<b>97.8</b>	<b>79,640</b>	<b>98.3</b>	

Source: 2022 5-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

# Migration

## Overall Migration Flows

### Definition:

The United States is a country with an increasingly mobile population. People move, migrate, from one place to another with increasing frequency.

### Why is it important?

Having a handle on whether or not Carlsbad is a net recipient (migration inflows) or donor (mi-

gration outflows) of population is very important for understanding trends in the City's development. This section outlines migration patterns by age, education, income, marital status, and housing tenure. Understanding recent trends is very important for making policy, investment, and other decisions about the future. Also, understanding the extent to which the population is stable, or experiences significant turnover each year is helpful for planning purposes.

Figure 87: Overall Movements of Residents

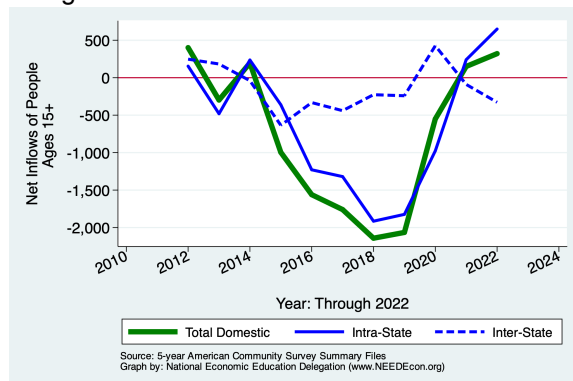


Table 17: Migration by Income

Category	Population	Net Inflows				
		All Migration	Same State		Across States	From Abroad
			W/in County	Between Counties		
No income	12,843	97	364	-84	-210	27
With income	81,405	729	448	-79	-118	478
\$1 to \$9,999 or less	8,791	-700	-265	-408	-166	139
\$10,000 to \$14,999	5,103	52	-15	18	49	0
\$15,000 to \$24,999	8,059	449	361	31	-49	106
\$25,000 to \$34,999	6,279	208	281	63	-159	23
\$35,000 to \$49,999	7,705	-12	-37	-67	63	29
\$50,000 to \$64,999	6,732	78	140	-121	-26	85
\$65,000 to \$74,999	3,780	-87	-88	-28	29	0
\$75,000 or more	34,956	741	71	433	141	96
<b>All:</b>	94,248	826	812	-163	-328	505

Source: 2022 5-year American Community Survey, Summary File

Note: The data in this and other tables in this section are limited in that there is no information on the City's population that has moved abroad.

The "From Abroad" column is gross movements into the City from abroad.

Figure 88: Overall Movements of Low Income Residents

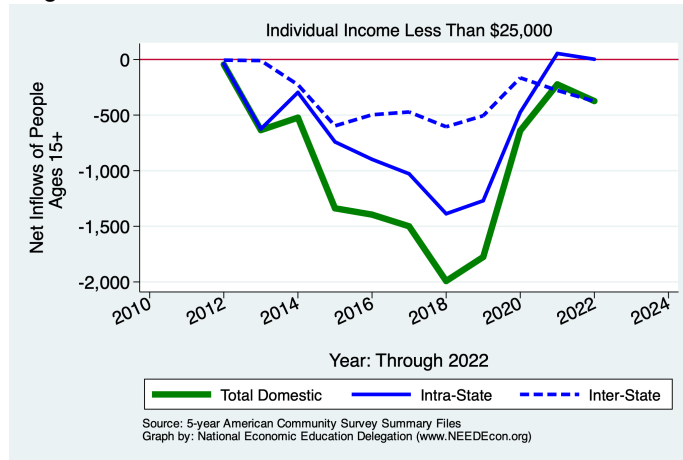


Figure 89: Overall Movements of Middle Income Residents

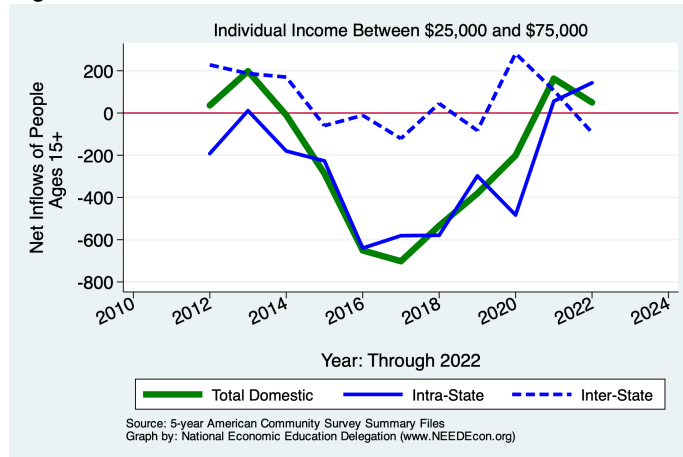
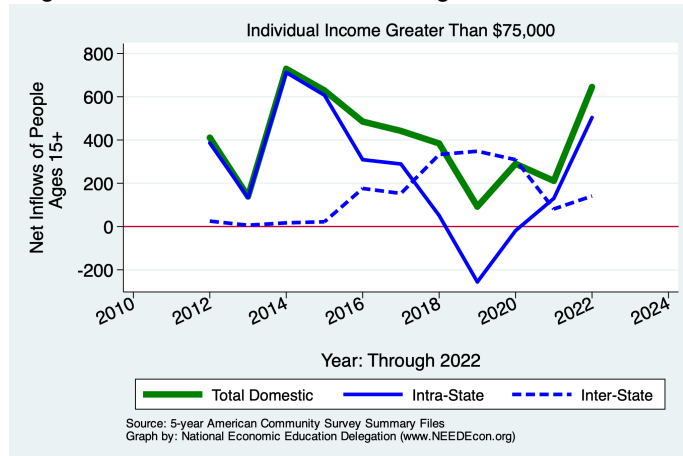


Figure 90: Overall Movements of High Income Residents





## Demographics of Migration Flows

**Table 18: Migration by Marital Status**

Category	Population	Net Inflows				
		All Migration	Same State			From Abroad
			W/in County	Between Counties	Across States	
Never married	25,495	-911	-186	-286	-525	86
Now married, except separated	54,483	1,355	894	72	4	385
Divorced	10,058	438	228	63	113	34
Separated	727	-232	-187	-51	6	0
Widowed	3,485	176	63	39	74	0
<b>Total:</b>	94,248	826	812	-163	-328	505

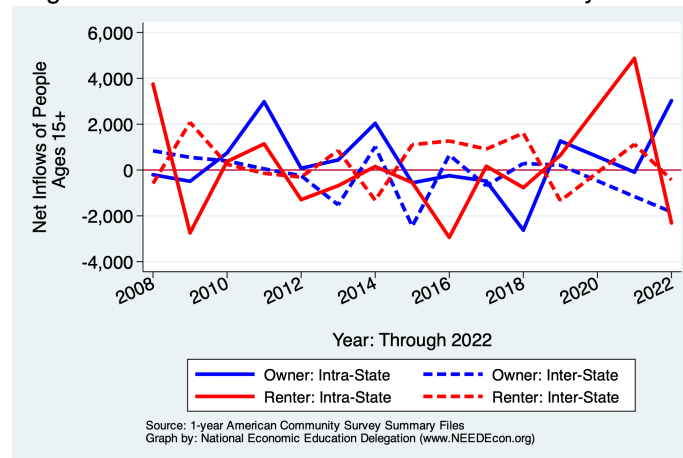
Source: 2022 5-year American Community Survey, Summary File

**Table 19: Migration by Tenure**

Category	Population	Net Inflows				
		All Migration	Same State			From Abroad
			W/in County	Between Counties	Across States	
Householder lived in owner-occupied housing units	77,206	1,690	1,540	1,487	-1,828	491
Householder lived in renter-occupied housing units	34,873	-2,351	-2,363	53	-432	391
<b>Total:</b>	112,079	-661	-823	1,540	-2,260	882

Source: 2022 1-year American Community Survey, Summary File

**Figure 91: Domestic Movements of Residents by Tenure**



**Table 20: Migration by Age**

Category	Population	Net Inflows				
		All Migration	Same State			From Abroad
			W/in County	Between Counties	Across States	
1 to 4 years	3,515	-243	-127	-21	-95	0
5 to 17 years	21,425	592	414	121	-36	93
18 and 19 years	2,271	-794	-123	-448	-223	0
20 to 24 years	5,166	111	84	31	-27	23
25 to 29 years	6,679	56	129	-128	-46	101
30 to 34 years	5,828	-57	-34	-63	-74	114
35 to 39 years	7,192	202	-1	108	23	72
40 to 44 years	8,471	348	101	197	0	50
45 to 49 years	7,899	72	40	-91	41	82
50 to 54 years	8,725	-46	131	-38	-139	0
55 to 59 years	8,692	216	154	70	-26	18
60 to 64 years	7,266	117	22	36	51	8
65 to 69 years	5,655	-32	32	-38	-26	0
70 to 74 years	5,333	133	51	65	17	0
75 years and over	9,458	440	188	166	86	0
<b>Total Population:</b>	113,575	1,115	1,061	-33	-474	561

Source: 2022 5-year American Community Survey, Summary File

**Table 21: Migration by Educational Attainment**

Category	Population	Net Inflows				
		All Migration	Same State			From Abroad
			W/in County	Between Counties	Across States	
Less than high school graduate	2,918	-564	-547	-17	0	0
High school graduate (includes equiv)	6,837	-755	-718	239	-276	0
Some college or assoc. degree	17,915	-705	60	70	-835	0
Bachelor's degree	30,539	40	377	-93	-636	392
Graduate or professional degree	20,087	836	179	847	-427	237
<b>Total:</b>	78,296	-1,148	-649	1,046	-2,174	629

Source: 2022 1-year American Community Survey, Summary File

**Table 22: Median Income of Migration Flows**

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	72,529	72,529
Moved Within Same County	73,832	53,974
Moved to Different County, Same State	92,062	11,207
Moved Between States	52,795	39,000
Moved from Abroad	33,995	
<b>Total Population:</b>	71,925	65,628

Source: 2022 1-year American Community Survey, Summary File

**Table 23: Median Age of Migration Flows**

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	42.3	42.3
Moved Within Same County	34.3	33.0
Moved to Different County, Same State	39.8	20.5
Moved Between States	23.8	27.9
Moved from Abroad	35.7	
<b>Total Population:</b>	40.7	40.7

Source: 2022 1-year American Community Survey, Summary File

## References and Sources

The majority of the data presented in this report are from the American Community Survey (ACS). For larger geographies, the 1-year Summary Files provide the data. For smaller communities, roughly those with less than 65,000 in population in 2021, the 5-year Summary Files provide the data.

The ACS data are supplemented by building permit data from the U.S. Census Bureau, population and housing data from the California Department of Finance, and home price and rental rates from Zillow.

U.S. Census Bureau. American Community Survey 1-year and 5-year Summary Files. <https://www.census.gov/programs-surveys/acs/data/data-via-ftp.html>. The 1-year data are released in September each year and the 5-year data are released in January.

Zillow Research Data <https://www.zillow.com/research/data/>

U.S. Census Bureau. Building Permits Data, updated annually in February. <https://www.census.gov/construction/bps/current.html>

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State of California, Department of Finance, E-2. California County Population Estimates and Components of Change by Year, July 1, 2010-2021. Sacramento, California, December. <https://dof.ca.gov/forecasting/demographics/>

State of California, Department of Finance, E-1 Population Estimates for Cities, Counties and the State with Annual Percent Change — January 1. Sacramento, California, May. <https://dof.ca.gov/forecasting/demographics/>