



SAN DIEGO NORTH
Economic Development Council



WORKER COMMUTING PATTERNS IN NORTH COUNTY

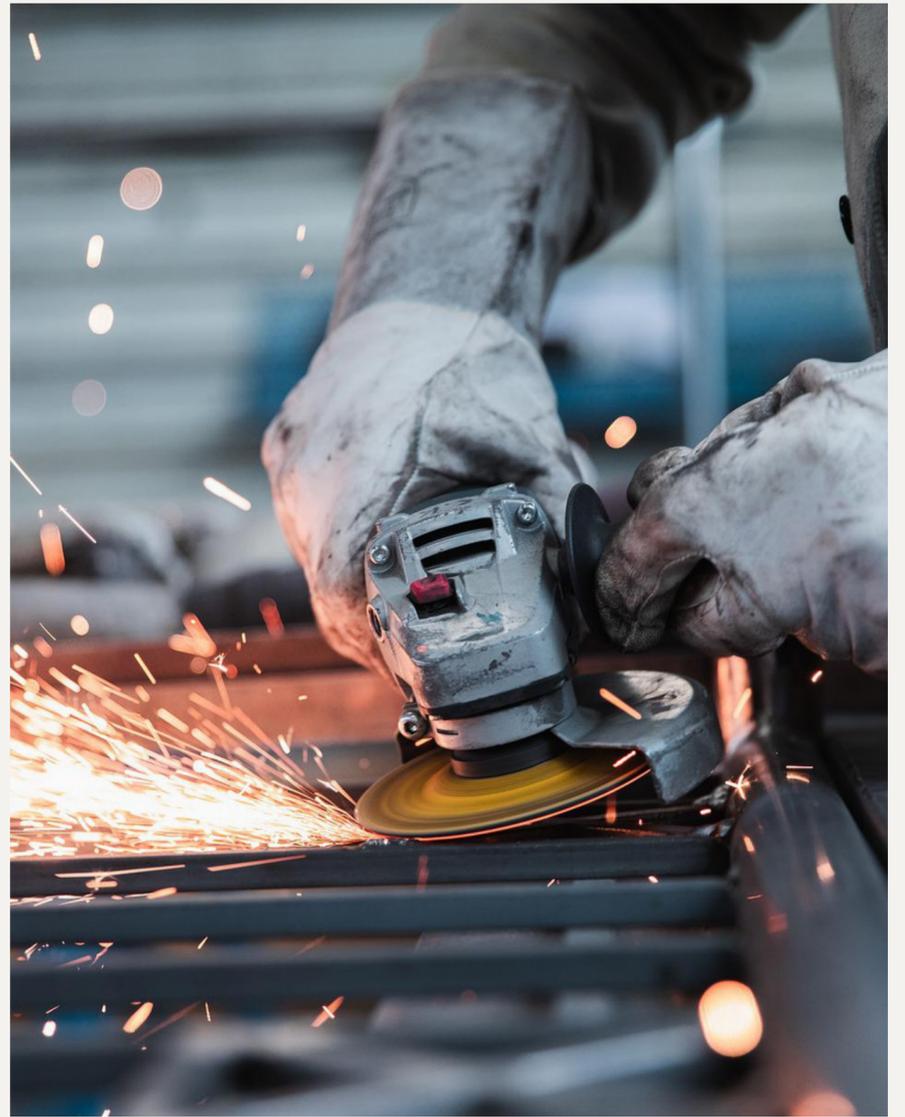
A COMPLEMENTARY CORRIDOR IN ACTION

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EXECUTIVE REPORT

SUMMARY

- MORE THAN 120,000 WORKERS LIVE AND WORK ON THE SR 78 CORRIDOR.
- SIGNIFICANTLY MORE OF THESE WORKERS (70,600) LIVE IN ONE CITY AND COMMUTE TO ONE OF THE OTHER FOUR CITIES, THAN LIVE AND WORK IN THE SAME CITY (49,600).
- IN CARLSBAD, VISTA, AND SAN MARCOS, MORE WORKERS COMMUTE TO ONE OF THE OTHER COLLABORATIVE PARTNER CITIES THAN LIVE AND WORK WITHIN THEIR HOME CITY'S BOUNDARIES.



COMMUTING AND THE SR 78 CORRIDOR

LOCATION: The freeway portion of the State Route 78 stretches about 18 miles from **North of downtown Escondido to Interstate 5 at the border of Oceanside and Carlsbad**. The five cities along the route have a **total population of 643,513*** and a **total workforce of 276,3002.****

If the cities along the SR 78 were a single city, **together the five municipalities would be the fifth-largest in the state, just behind San Francisco, San Jose, San Diego, and Los Angeles**. As they have grown over the past several decades, **the corridor cities' borders have become blurred**. Major arterials link the cities together and allow individuals to move with relative ease between them to work and recreate.

SDNEDC is committed to the idea that North County does better when these cities work together to create a better economic climate for North County businesses and residents as a whole.

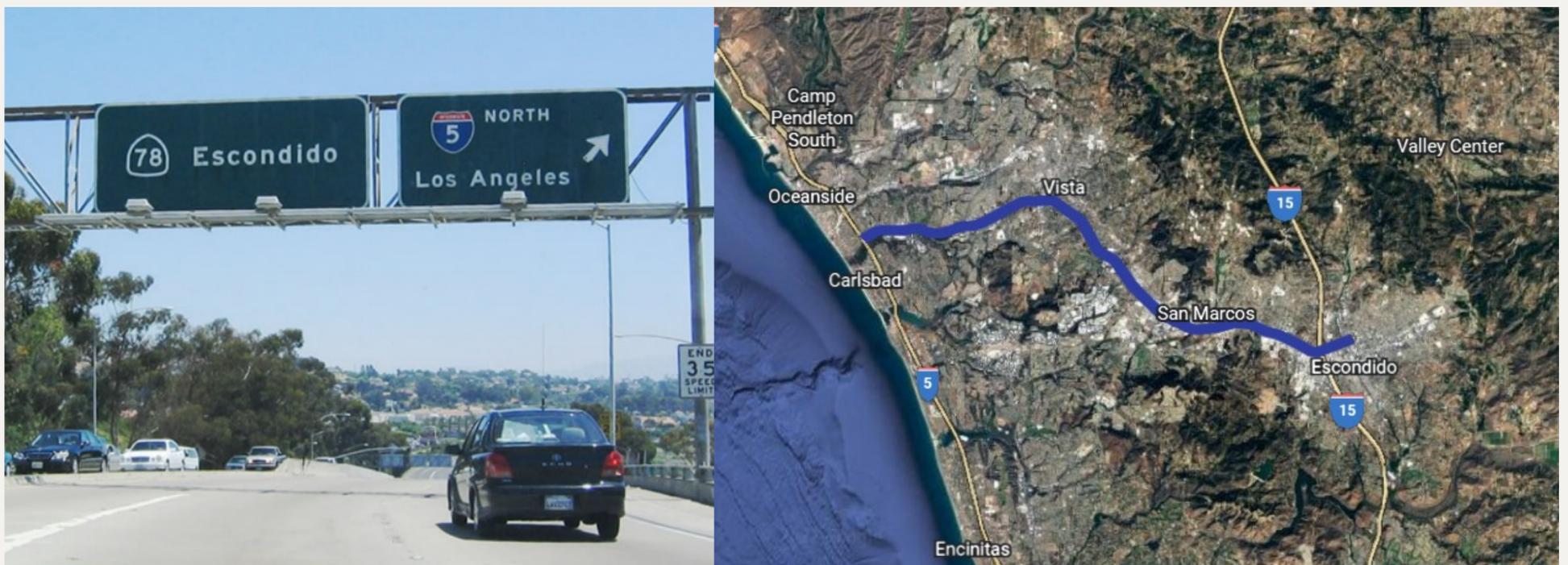
To help better understand these synergies, SDNEDC examined data from the U.S. Census Bureau from its Longitudinal Employer-Household Dynamics (LEHD) program. Under this program, states agree to share Unemployment Insurance earnings data and the Quarterly Census of Employment and Wages (QCEW) data with the Census Bureau.

The LEHD program combines these administrative data, additional administrative data, and data from censuses and surveys. From these data sets, the program creates statistics on employment, earnings, and job flows at detailed levels of geography and industry for different demographic groups. In addition, the LEHD program uses the data to create partially synthetic data on workers' residential patterns.

OnTheMap (<https://onthemap.ces.census.gov/>) is a LEHD tool that allowed us to examine where workers are employed and where they live. Analysis within this report was performed using the Destination function to census-designated places. The data in this report reflect all jobs in 2019, the latest year available using this tool. Data was generated 02/02/2022.

* Ca Department of Finance, E-5 Estimate

** California Employment Development Department



FINDINGS

Given the extent that the boundaries of the five SR 78 cities have blurred, it was not surprising to find that **many residents live in one city but work in another**. The surprise is that **this pattern is found in a majority of the cities** (three out of five).

CITY	WORKERS WHO LIVE AND WORK IN THIS CITY	WORKERS WHO LIVE IN ANOTHER SR 78 CITY AND WORK WITHIN THIS CITY
Escondido	12,970	8,847
Vista	6,282	12,411
San Marcos	5,511	11,949
Carlsbad	11,332	26,150
Oceanside	13,471	10,955
TOTAL	49,566	70,649

This pattern is most pronounced in the three SR 78 cities with large regional “job centers.”

San Marcos is home to California State University, San Marcos; Palomar Community College; and several larger employers (like Hunter Industries), which help bring employees from all over the region. **Vista** and **Carlsbad** are home to some of North County’s largest business parks, with employers that draw talent from throughout the region.

Both **Escondido** and **Oceanside** jobs are filled by more residents from their own cities, but the difference between the number of residents filling local jobs and other SR 78 city residents filling those jobs is small.



CORRIDOR TALENT REPORT

ESCONDIDO SEES NEARLY AS MANY PEOPLE COMMUTING FROM OTHER SR 78 CITIES AS IT SEES ESCONDIDO RESIDENTS FILLING THOSE JOBS, AND VICE VERSA.

FINDINGS:

- NEARLY EQUAL AMOUNTS OF ESCONDIDO RESIDENTS WORK IN ESCONDIDO (18.8%) AS WORK IN OTHER SR 78 CITIES (18.9%).
- NEARLY AS MANY JOBS IN ESCONDIDO ARE HELD BY RESIDENTS OF SR 78 CITIES (17%) AS ARE HELD BY ESCONDIDO RESIDENTS (25%).
- ONLY 18.8% OF ESCONDIDO RESIDENTS BOTH WORK AND LIVE WITHIN ESCONDIDO CITY LIMITS.
- MOST ESCONDIDO RESIDENTS COMMUTE TO WORK OUTSIDE OF THE REGION (62.2%)



RESIDENTIAL ANALYSIS

TOTAL JOBS IN ESCONDIDO – 51,950

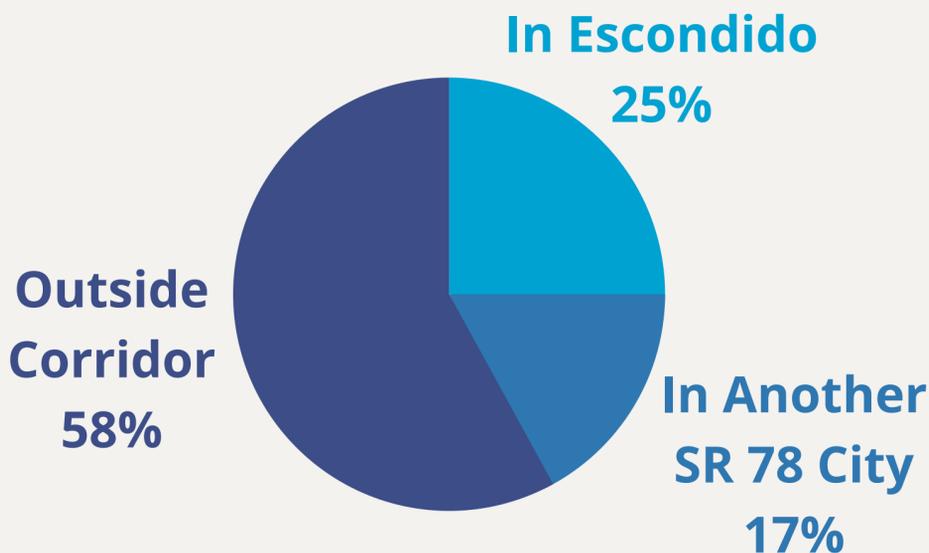
- 25% OF JOBS ARE HELD BY PEOPLE WHO LIVE IN ESCONDIDO
- 17% OF ESCONDIDO JOBS ARE HELD BY PEOPLE WHO LIVE IN ANOTHER SR-78 CITY
- 58% OF ESCONDIDO JOBS ARE HELD BY PEOPLE WHO LIVE OUTSIDE OF THE SR 78 CORRIDOR

EMPLOYMENT ANALYSIS

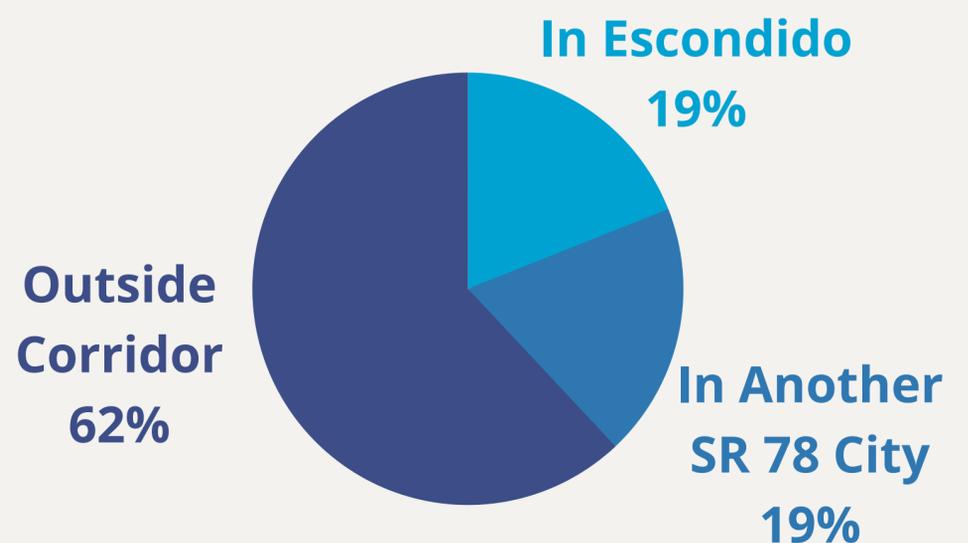
TOTAL LABOR FORCE IN ESCONDIDO – 68,824

- 18.8% BOTH LIVE AND WORK WITHIN ESCONDIDO
- 18.9% OF ESCONDIDO RESIDENTS COMMUTE TO ANOTHER SR 78 CITY
- 62.2% OF ESCONDIDO RESIDENTS WORK OUTSIDE OF THE SR 78 CORRIDOR

WHERE ESCONDIDO TALENT LIVES



WHERE ESCONDIDO RESIDENTS WORK





CORRIDOR TALENT REPORT

VISTA IS HOME TO SOME OF NORTH COUNTY'S LARGEST BUSINESS PARKS, WITH EMPLOYERS THAT DRAW TALENT FROM THROUGHOUT THE REGION.

FINDINGS:

- VISTA JOBS ARE FILLED BY TWICE AS MANY WORKERS FROM OTHER SR 78 CITIES (33.4%) THAN BY VISTA RESIDENTS (16.9%).
- MOST VISTA RESIDENTS COMMUTE TO OTHER SR 78 CITIES (35.5%) OR BEYOND (50.5%).
- ONLY 14% OF VISTA RESIDENTS BOTH LIVE AND WORK WITHIN VISTA CITY LIMITS.



RESIDENTIAL ANALYSIS

TOTAL JOBS IN VISTA – 37,156

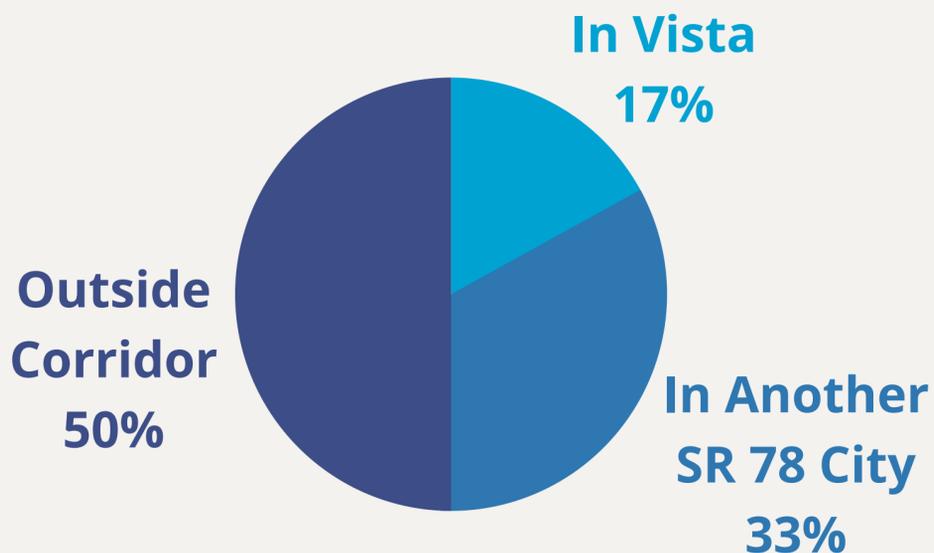
- 16.9% OF JOBS ARE HELD BY PEOPLE WHO LIVE IN VISTA
- 33.4% OF VISTA JOBS ARE HELD BY PEOPLE WHO LIVE IN ANOTHER SR-78 CITY
- 49.7% OF VISTA JOBS ARE HELD BY PEOPLE WHO LIVE OUTSIDE OF THE SR 78 CORRIDOR

EMPLOYMENT ANALYSIS

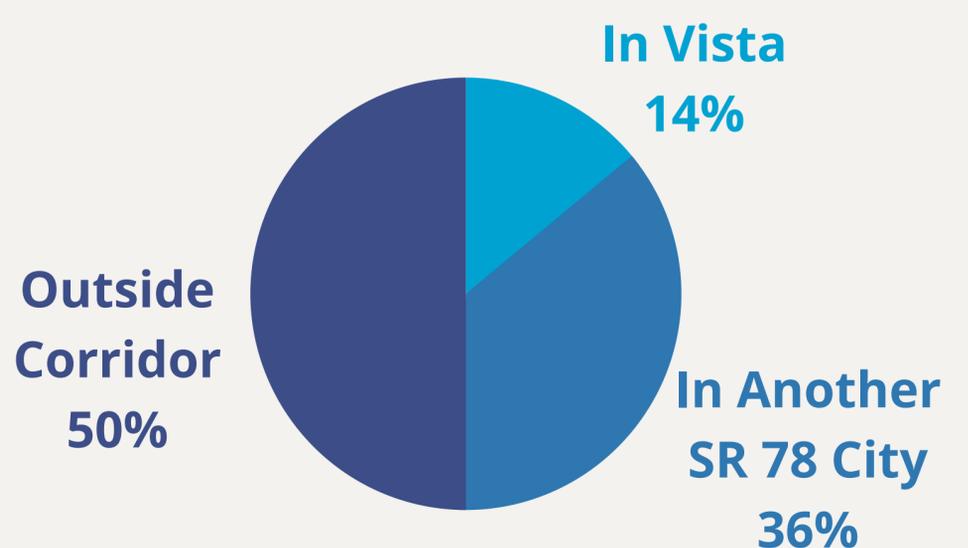
TOTAL LABOR FORCE IN VISTA – 44,859

- 14% BOTH LIVE AND WORK WITHIN VISTA
- 35.5% OF VISTA RESIDENTS WORK IN ANOTHER SR 78 CITY
- 50.5% OF VISTA RESIDENTS WORK OUTSIDE OF THE SR 78 CORRIDOR

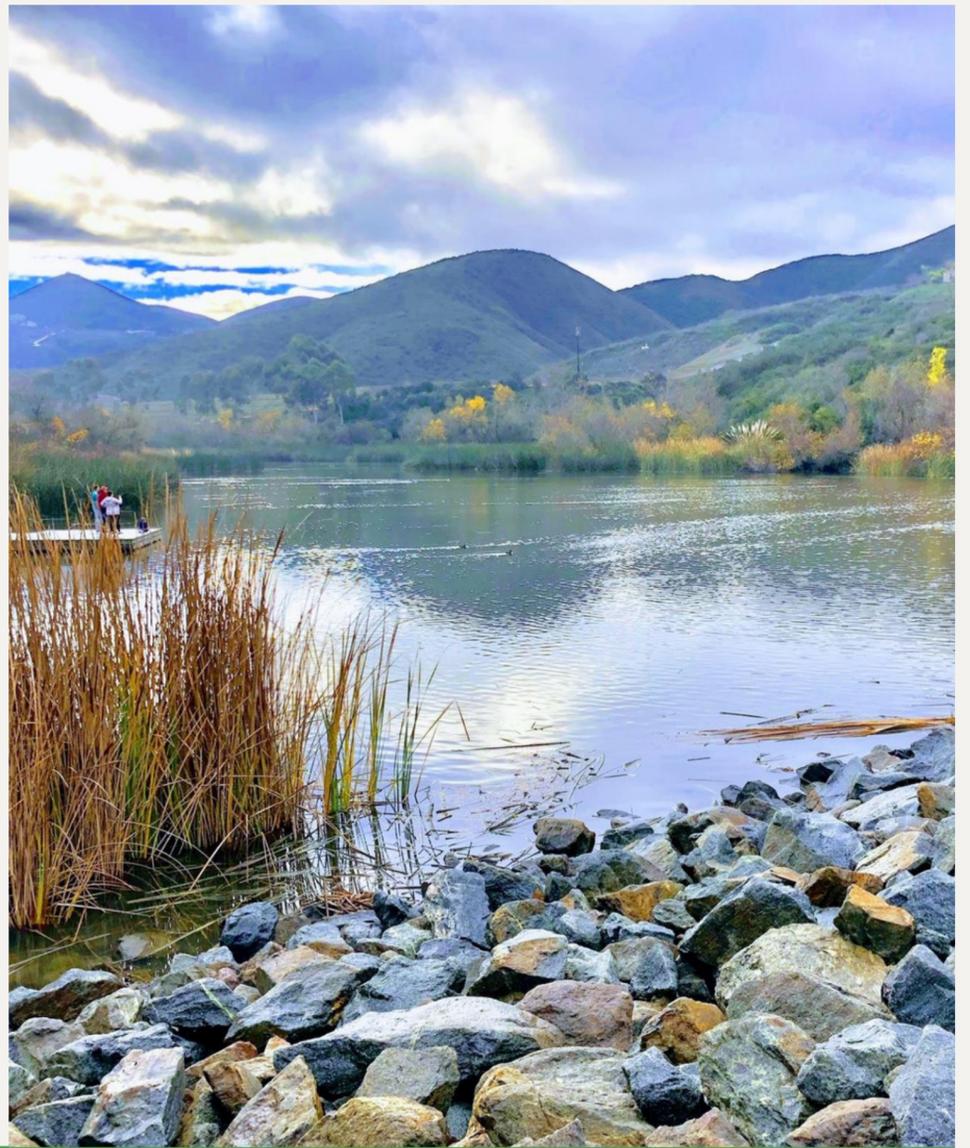
WHERE VISTA TALENT LIVES



WHERE VISTA RESIDENTS WORK



CORRIDOR TALENT REPORT



SAN MARCOS IS HOME TO CALIFORNIA STATE UNIVERSITY, SAN MARCOS; PALOMAR COMMUNITY COLLEGE; AND SEVERAL LARGER EMPLOYERS, WHICH HELP BRING EMPLOYEES FROM ALL OVER THE REGION.

FINDINGS:

- MORE SAN MARCOS JOBS ARE HELD BY RESIDENTS FROM OTHER SR 78 CITIES (31.6%) THAN ARE HELD BY SAN MARCOS RESIDENTS (14.2%).
- MOST SAN MARCOS RESIDENTS WORK IN OTHER SR 78 CITIES (29.8%) OR BEYOND (56.5%).
- ONLY 13.7% OF SAN MARCOS RESIDENTS BOTH LIVE AND WORK WITHIN SAN MARCOS CITY LIMITS.

RESIDENTIAL ANALYSIS

TOTAL JOBS IN SAN MARCOS – 38,831

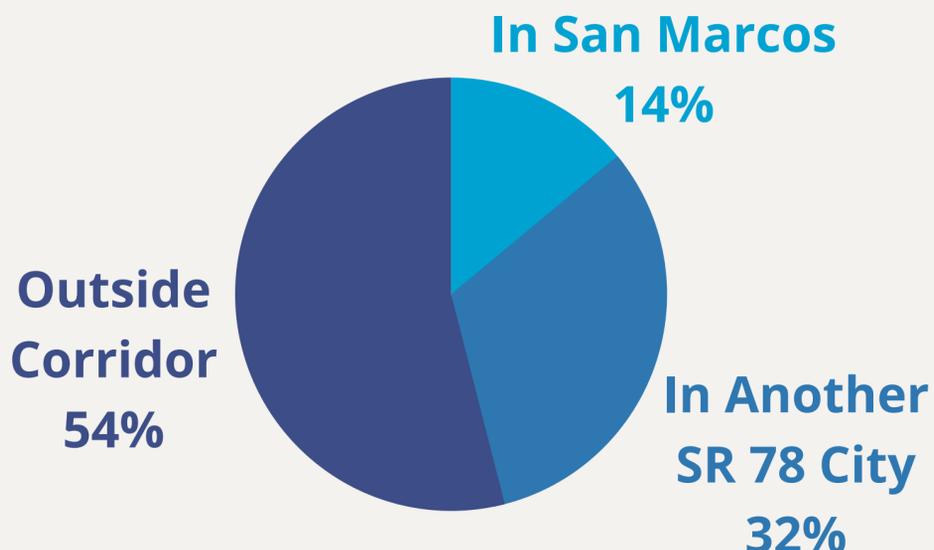
- 14.2% OF JOBS ARE HELD BY PEOPLE WHO LIVE IN SAN MARCOS
- 31.6% OF SAN MARCOS JOBS ARE HELD BY PEOPLE WHO LIVE IN ANOTHER SR-78 CITY
- 54.2% OF SAN MARCOS JOBS ARE HELD BY PEOPLE WHO LIVE OUTSIDE OF THE SR 78 CORRIDOR

EMPLOYMENT ANALYSIS

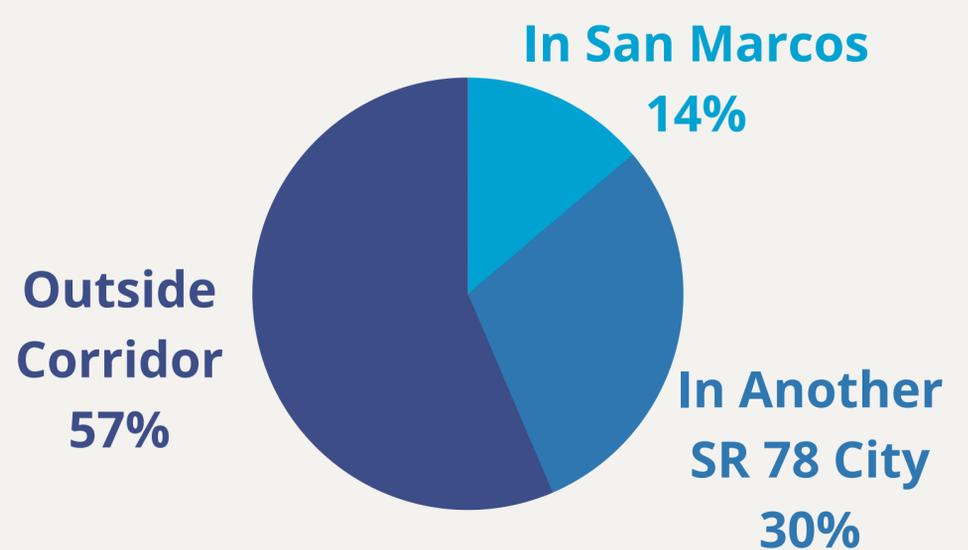
TOTAL LABOR FORCE IN SAN MARCOS – 40,150

- 13.7% BOTH LIVE AND WORK WITHIN SAN MARCOS
- 29.8% OF SAN MARCOS RESIDENTS WORK IN ANOTHER SR 78 CITY
- 56.5% OF SAN MARCOS RESIDENTS WORK OUTSIDE OF THE SR 78 CORRIDOR

WHERE SAN MARCOS TALENT LIVES



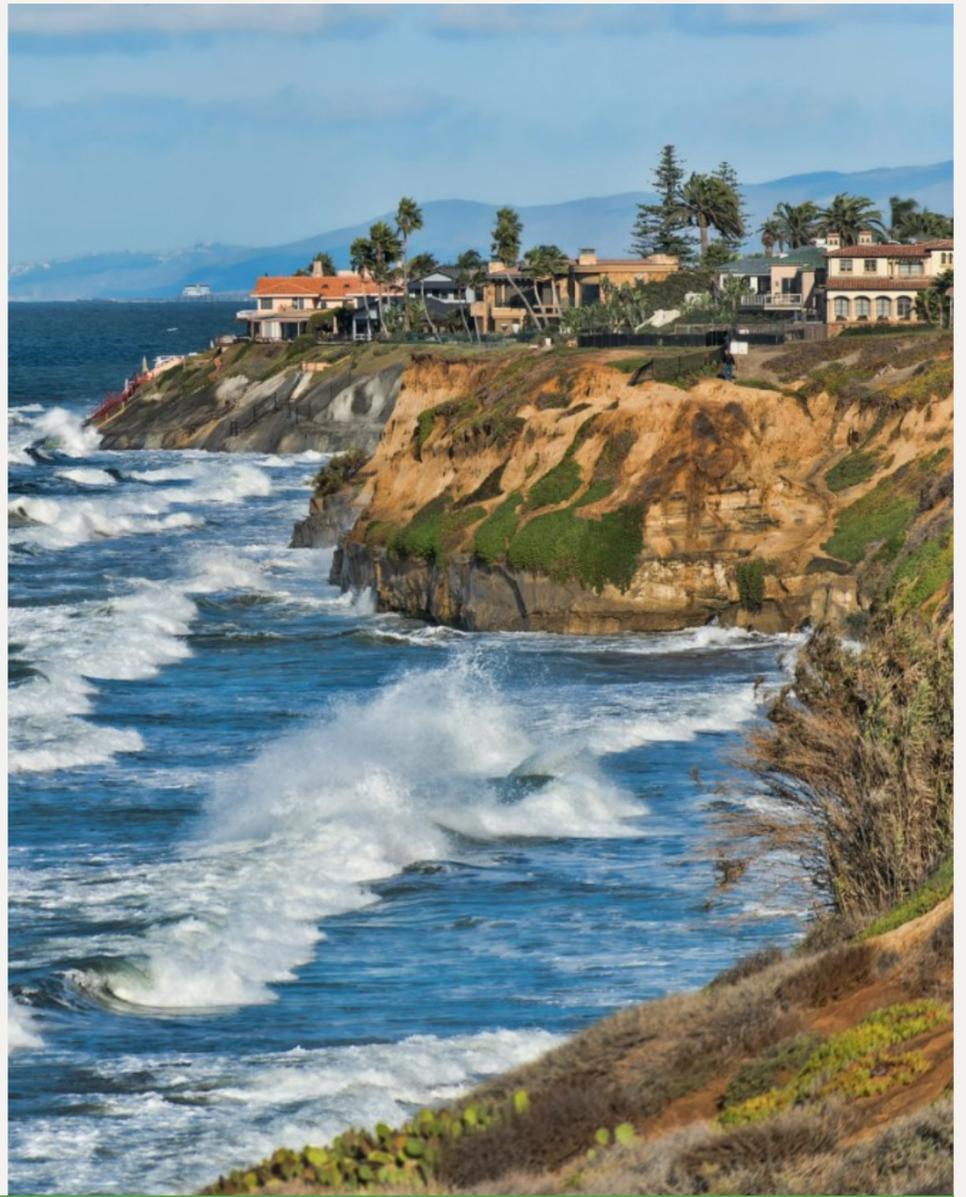
WHERE SAN MARCOS RESIDENTS WORK





City of Carlsbad

CORRIDOR TALENT REPORT



CARLSBAD IS HOME TO SOME NORTH COUNTY'S LARGEST BUSINESS PARKS WITH EMPLOYERS THAT DRAW TALENT FROM THROUGHOUT THE REGION.

FINDINGS:

- MORE CARLSBAD JOBS ARE HELD BY RESIDENTS FROM OTHER SR 78 CITIES (33.9%) OR BEYOND (51.4%) THAN ARE FILLED BY CARLSBAD RESIDENTS (14.7%)
- THE MAJORITY OF CARLSBAD WORKERS WORK IN ANOTHER SR 78 CITY (15.2 %) OR BEYOND (61.5%).
- ONLY 23% OF CARLSBAD RESIDENTS BOTH LIVE AND WORK WITHIN CARLSBAD CITY LIMITS.

RESIDENTIAL ANALYSIS

TOTAL JOBS IN CARLSBAD – 77,186

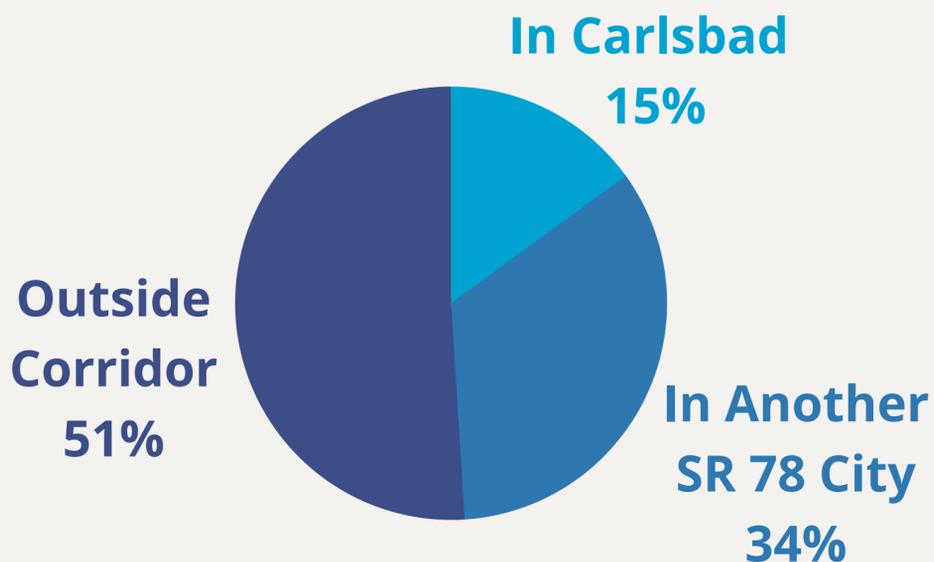
- 14.7% OF JOBS ARE HELD BY PEOPLE WHO LIVE IN CARLSBAD
- 33.9% OF CARLSBAD JOBS ARE HELD BY PEOPLE WHO LIVE IN ANOTHER SR-78 CITY
- 51.4% OF CARLSBAD JOBS ARE HELD BY PEOPLE WHO LIVE OUTSIDE OF THE SR 78 CORRIDOR

EMPLOYMENT ANALYSIS

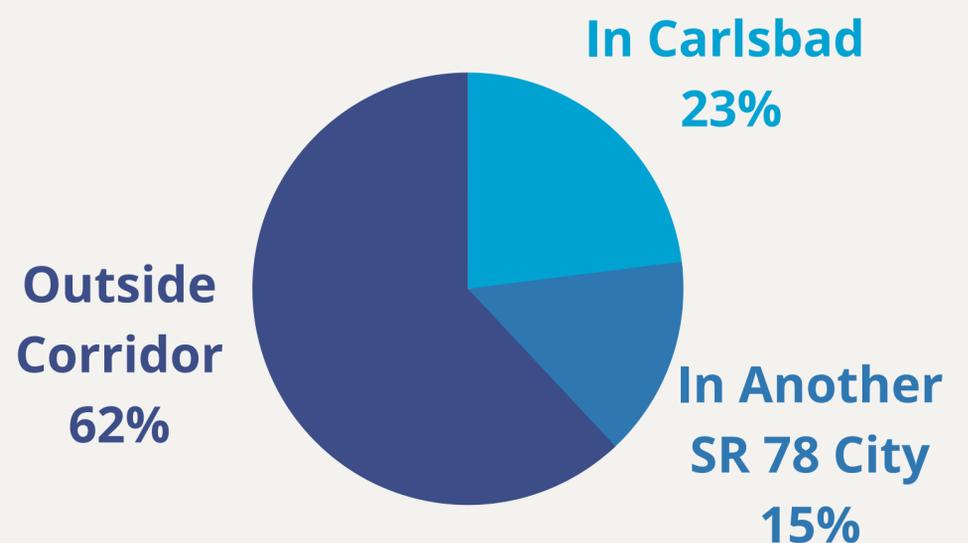
TOTAL LABOR FORCE IN CARLSBAD – 48,764

- 23.2% BOTH LIVE AND WORK WITHIN CARLSBAD
- 15.2% OF CARLSBAD RESIDENTS COMMUTE TO ANOTHER SR 78 CITY
- 61.5% OF CARLSBAD RESIDENTS WORK OUTSIDE OF THE SR 78 CORRIDOR

WHERE CARLSBAD TALENT LIVES



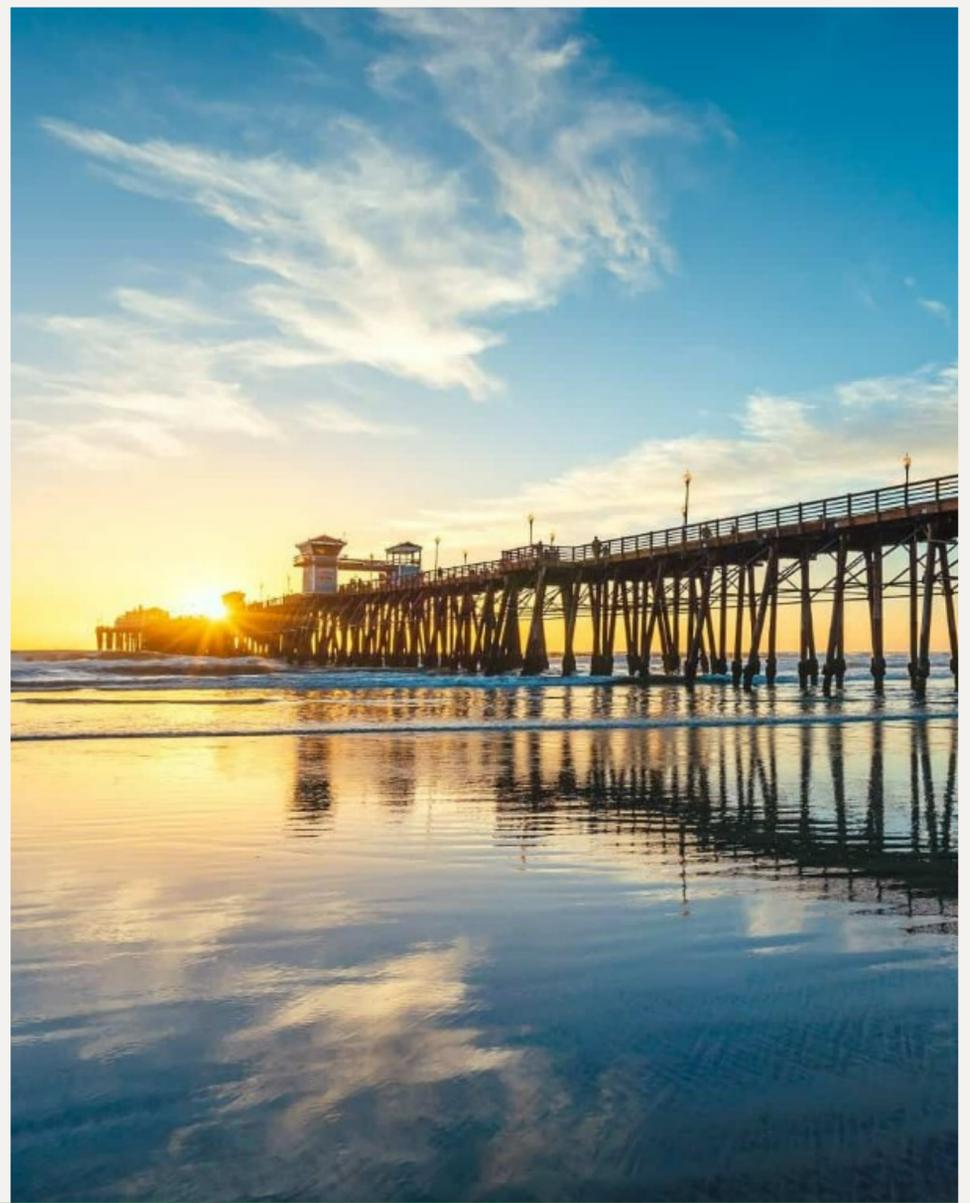
WHERE CARLSBAD RESIDENTS WORK





CITY OF OCEANSIDE

CORRIDOR TALENT REPORT



OCEANSIDE SEES NEARLY AS MANY OF ITS JOBS HELD BY OTHER SR 78 CITY RESIDENTS AS IT SEES OCEANSIDE RESIDENTS FILLING THOSE JOBS.

FINDINGS:

- NEARLY AS MANY OCEANSIDE JOBS ARE HELD BY RESIDENTS OF OTHER SR 78 CITIES (23.9%) AS ARE HELD BY OCEANSIDE RESIDENTS (29.4%)
- MOST OCEANSIDE RESIDENTS EITHER COMMUTE TO OTHER SR 78 CITIES (30.3%) OR BEYOND (51.5%).
- ONLY 18.3% OF OCEANSIDE RESIDENTS BOTH LIVE AND WORK WITHIN OCEANSIDE CITY LIMITS.

RESIDENTIAL ANALYSIS

TOTAL JOBS IN OCEANSIDE – 45,891

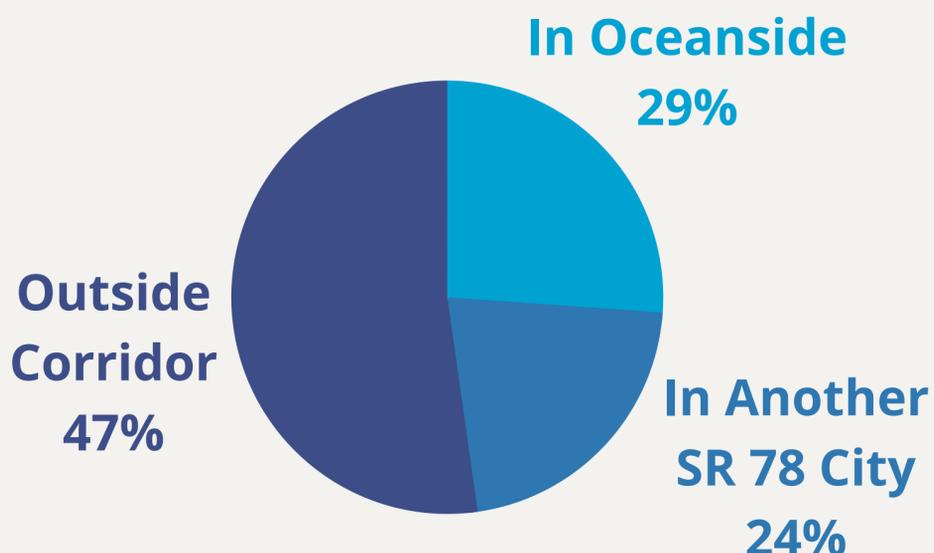
- 29.4% OF JOBS ARE HELD BY PEOPLE WHO LIVE IN OCEANSIDE
- 23.9% OF OCEANSIDE JOBS ARE HELD BY PEOPLE WHO LIVE IN ANOTHER SR-78 CITY
- 46.8% OF OCEANSIDE JOBS ARE HELD BY PEOPLE WHO LIVE OUTSIDE OF THE SR 78 CORRIDOR

EMPLOYMENT ANALYSIS

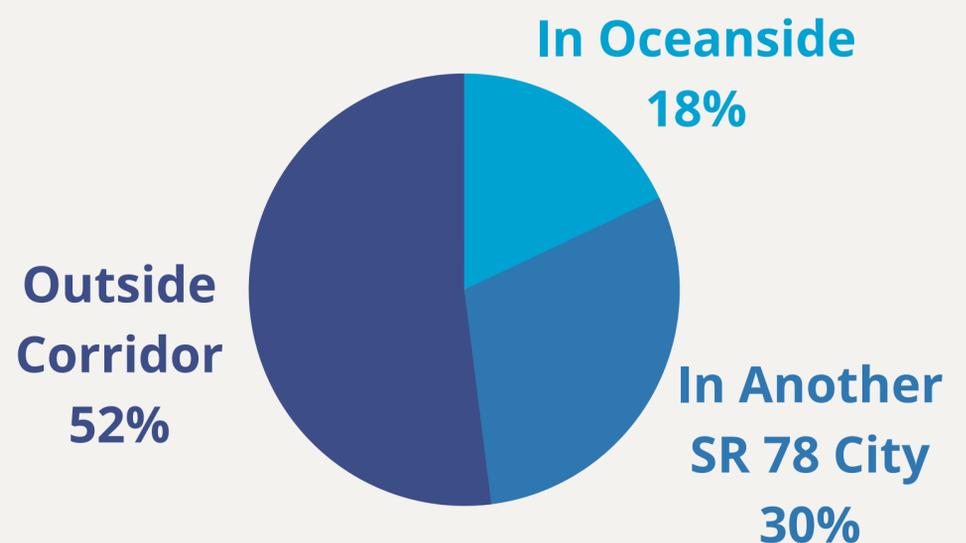
TOTAL LABOR FORCE IN OCEANSIDE – 73,725

- 18.3% BOTH LIVE AND WORK WITHIN OCEANSIDE
- 30.3% OF OCEANSIDE RESIDENTS COMMUTE TO ANOTHER SR 78 CITY
- 51.5% OF OCEANSIDE RESIDENTS WORK OUTSIDE OF THE SR 78 CORRIDOR

WHERE OCEANSIDE TALENT LIVES



WHERE OCEANSIDE RESIDENTS WORK



KEY TAKEWAYS

- The fate of companies and the economic well-being of residents within each *city* are highly impacted by *sub-regional* and *regional* trends.
- Quality of life in neighboring cities is important. Carlsbad, San Marcos, and Vista companies source more talent from other SR 78 cities than from within their own.
- SDNEDC recognizes that conditions along the SR 78 Corridor are pertinent to each of the five cities and is committed to helping the sub-region work together as a whole to develop their economies.